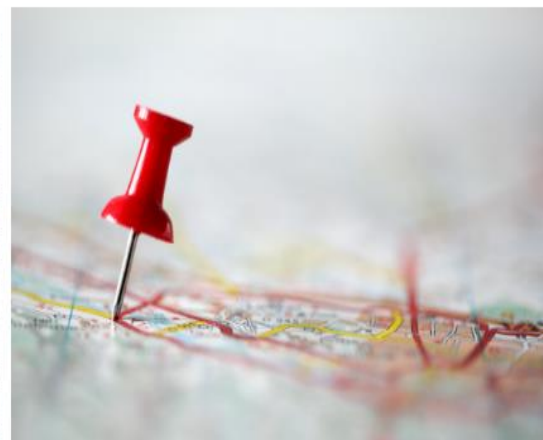


Florida's Roadmap to Living Healthy User Manual

Version 1.0

10/10/2017



Florida Department of Agriculture and Consumer Services • Adam H. Putnam, Commissioner

Table of Contents

1	INTRODUCTION.....	4
2	REGISTER/LOGIN.....	5
2.1	REGISTRATION	5
2.2	LOGIN	5
3	HOME PAGE	6
3.1	OVERVIEW	6
3.1.1	Content.....	6
3.1.2	Main Menu.....	6
3.1.3	About Section	6
3.1.4	Data Section	6
3.1.5	Map Section	7
3.1.6	Engagement Section	7
3.1.7	Contact Section	8
3.1.8	Help Section.....	8
4	DATA.....	9
4.1	OPEN DATA, DATA REPORTS	9
4.1.1	Navigation.....	9
4.1.2	Open Data	9
4.1.3	Reports	9
5	MAP	15
5.1	MAP SECTION.....	15
5.1.1	Map Section Navigation.....	15
5.1.2	Map Section Tiles	15
5.2	MAP MODULE.....	15
5.2.1	Map Controls.....	15
5.2.2	Search Map	17
5.2.3	Maps Gallery	19
5.2.4	Basemap Gallery	19
5.2.5	View Map Layers	20
5.2.6	View Map Details	21
5.2.7	Map Legend	21
5.2.8	Map Bookmarks	21
5.2.9	Draw On Map.....	22
5.2.10	Map Analysis.....	26
5.2.11	Query Map.....	32
5.2.12	Print Map	36
5.2.13	Export Map Layer Data.....	37
5.2.14	Map Measurement Tool	39
6	ENGAGEMENT.....	43
6.1	ENGAGEMENT SECTION	43
6.1.1	Surveys, Feedback & Testimonials	43
6.1.2	How to setup Qualtrics Survey Testimonials	Error! Bookmark not defined.

6.1.3	Take Survey	43
6.1.4	Feedback	43
6.1.5	Testimonials	44
7	HELP.....	46
7.1	FAQ, CONTACT & USER MANUAL.....	117
7.1.1	FAQ.....	117
7.1.2	Contact Information.....	117
7.1.3	User Manual.....	117
8	ADMINISTRATION	77
8.1	MANAGE USERS.....	86
8.1.1	View Users.....	86
8.1.2	Search Users.....	88
8.1.3	Add Users	89
8.1.4	Un-Authorize Users	91
8.1.5	Delete Users	92
8.1.6	View User Roles.....	93
8.1.7	View User Activity	95
8.1.8	View User Account Settings.....	96
8.1.9	User Account Data	97
8.1.10	Reset User's Password	98
8.1.11	Force Password Change	100
8.1.12	Login as User.....	101
8.1.13	Make Super User.....	102
8.2	MANAGE ROLES.....	103
8.2.1	View Roles	103
8.2.2	Search Roles	104
8.2.3	Add Roles.....	104
8.2.4	Edit Roles.....	106
8.2.5	Delete Roles.....	108
8.3	MANAGE PERMISSIONS	109
8.3.1	View Permissions.....	109
8.3.2	Permissions by Role.....	113
8.3.3	Permissions by User	115

1 Introduction

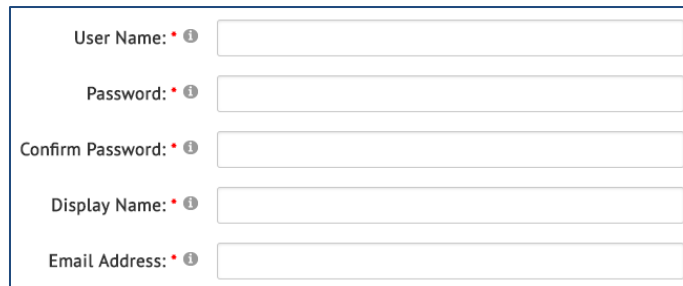
This document enumerates various functionalities that the Florida's Roadmap to Living Healthy web portal Application offers to the end users. This document outlines the basic workflows that the user should follow in order to accomplish successful use of all functionalities of the Roadmap Application.

The primary objective of this document is to help the end user use navigate the application with an understanding of with instructions of how to use the module included in the Roadmap Application. The main modules of the application include Home Page, Open Data, Map, Contact, Engagement and Help. The functionalities are outlined with a step by step description including screenshots to assist users with navigating and using the aforementioned modules.

2 Register/Login

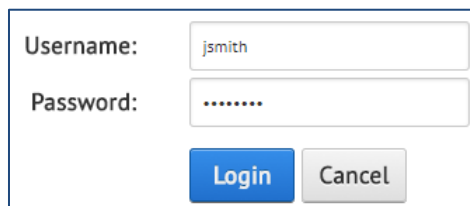
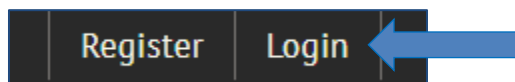
2.1 Registration

On the Food Nutrition and Wellness webpage there is link that provides users the opportunity to register as a Champion user for the Roadmap Application. Upon clicking the Registration link users will be asked to provide a user name, password, display name and email address. Once the account information is submitted, the Site Administrator will be notified of the submitted application and will be reviewed for approval. If the user's application is authorized, a notification will be sent to the user to inform them that they can access the site.

A registration form with five input fields, each preceded by a label and a red asterisk. The labels are 'User Name:', 'Password:', 'Confirm Password:', 'Display Name:', and 'Email Address:'. Each field has a small information icon to its right. The fields are empty.

2.2 Login

On the Food Nutrition and Wellness webpage there is link that will redirect users to the login page of the Roadmap Application where they can enter their username and password and login. After login, users will be redirected to the Roadmap to Living Healthy Home Page.

A login form with two input fields. The first field is labeled 'Username:' and contains the text 'jsmith'. The second field is labeled 'Password:' and contains seven dots. Below the fields are two buttons: a blue 'Login' button and a grey 'Cancel' button.

3 Home Page

3.1 Overview

3.1.1 Content

Upon Login, users will be redirected to the Home Page of the Roadmap application. The Home Page displays information about the Florida Department of Agriculture and Consumer Services and provides links to Open Data, additional information regarding different themes, thematic maps, surveys, feedback forms, testimonial forms and contact information.

3.1.2 Main Menu

The main menu is located at the top of the page. To expand the menu, click on the menu icon located in the top blue banner area. The menu will remain open until the close button, which is the “X” to the right of the menu items is selected.



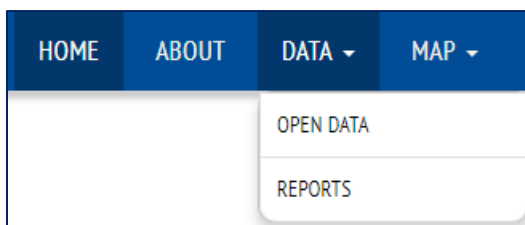
3.1.3 About Section

To navigate to the “About” section, click “About” in the main menu or scroll down the page. The “About” section will provide information about the Florida Department of Agriculture and Consumer Services including numerous ways that FDACS provides assistance to Florida’s citizens.



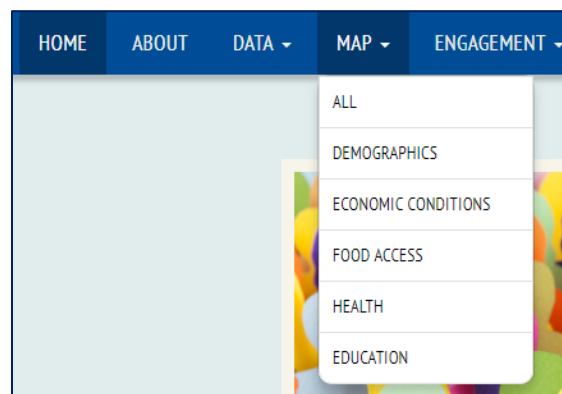
3.1.4 Data Section

The “Data” Section is where users, based on permissions, have the ability to choose links that will redirect users to Open Data where they can access more information for each theme. There also are tools to create different types of reports.



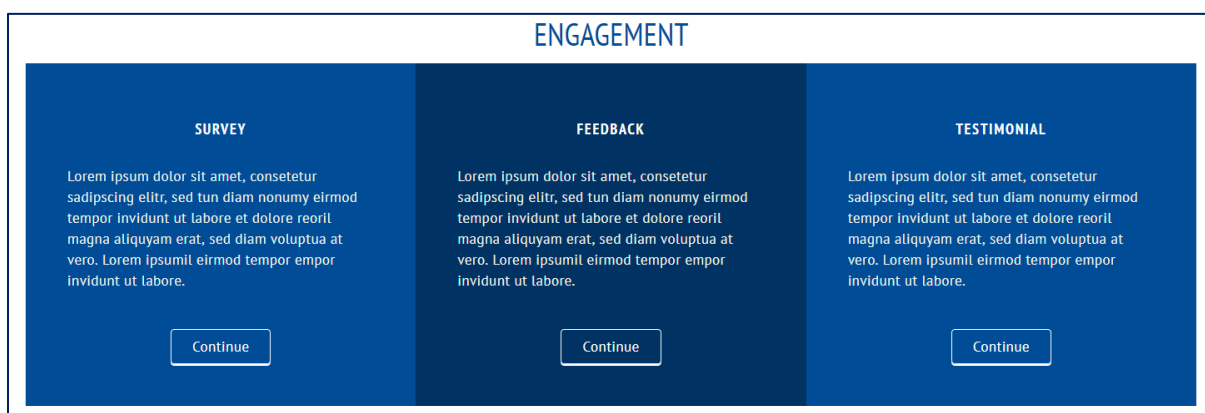
3.1.5 Map Section

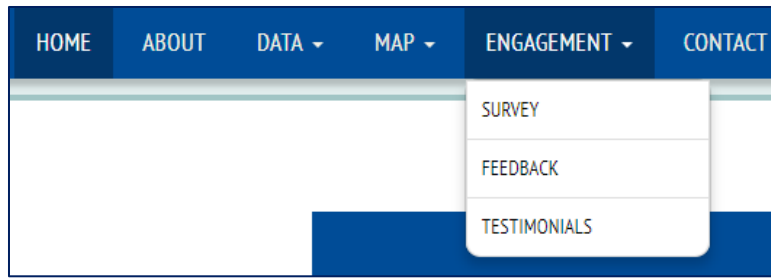
The “Map” section of the Home Page can be reached by either clicking “Map” on the main menu or scrolling down the Home Page. In the “Map” Section of the home page, there are six different tiles, five of the tiles each belong to a single theme and one tile, the “All” tile, represents all five themes.



3.1.6 Engagement Section

The “Engagement” section can be reached by selecting “Engagement” from the main menu or scrolling down the page. The Engagement section contains a general description of each component and a link to take a survey or create and submit testimonials and/or feedback.





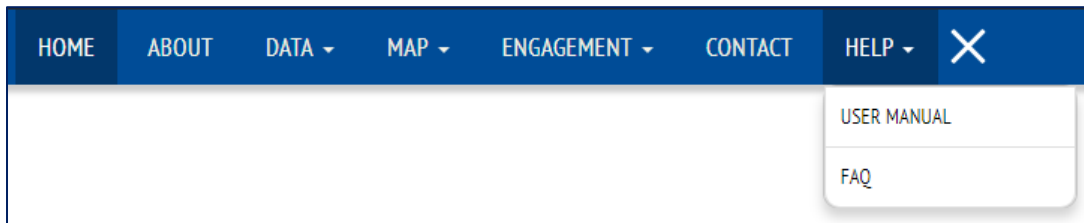
3.1.7 Contact Section

The “Contact” Section provides users the email address to contact the application administrator to submit concerns or ask questions relevant to the Roadmap to Living Healthy web portal application.



3.1.8 Help Section

Under the “Help” option on the main menu are links for users to be redirected to FAQ’s or to view the User Manual.



4 Data

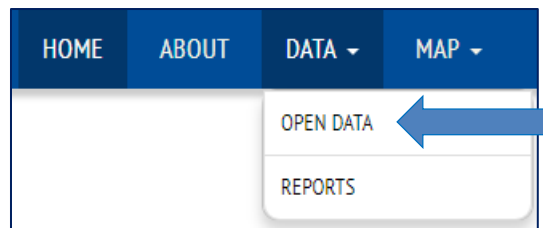
4.1 Open Data, Data Reports

4.1.1 Navigation

Users can navigate to the Data section of the home page by selecting “Data” from the main menu or manually scrolling down the home page.

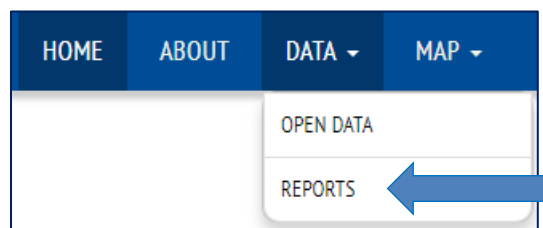
4.1.2 Open Data

Users can navigate to Open Data by clicking the Open Data on any of the themed Data section tiles. When a user clicks Open Data they will be redirected to the corresponding Open Data page for that theme.



4.1.3 Reports

Users can navigate to reports by clicking “Reports” on any of the themed tiles in the Data section of the Home Page. The system will display the map with the associated layers for the selected theme automatically.



4.1.3.1 View Report Data

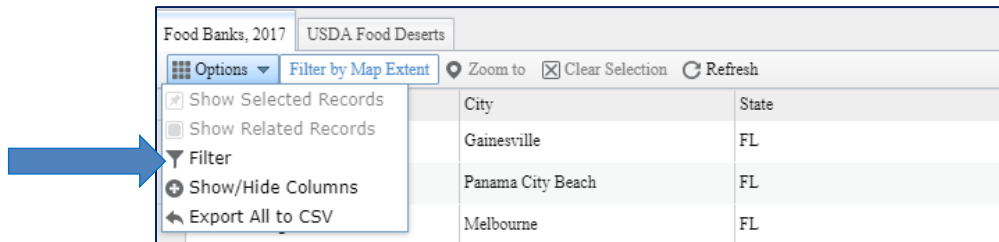
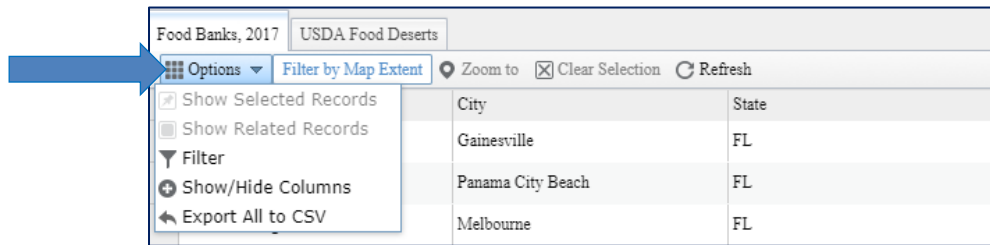
The data for the user selected associated theme will be displayed in a tabular form on different tabs for each individual layer at the bottom of the map page. Users can view the data for any layer associated with the user selected theme by clicking the different layer tabs in the data table.

Food Banks, 2017		
USDA Food Deserts		
Options Filter by Map Extent Zoom to Clear Selection Refresh		
Address	City	State
325 NW 10th Ave	Gainesville	FL
16610 Front Beach Rd	Panama City Beach	FL
1408 Morningside Dr	Melbourne	FL

4.1.3.2 Filtering Report Data

Users can filter the tabular data for any associated layer in the table. To filter the data, select the tab of the layer to be filtered. Next, click dropdown for “Option”. Then click “Filter”. Next, click “Add a filter expression” to filter

based on one item or “Add an expression set” to filter by multiple items. Users then have different options of how to filter the layer data. They can filter the data by either by the Value, Field or Unique filtering options.



Filter

Add a filter expression

Add an expression set

Without filter expression defined, this query task will list all features in the specified data source.

4.1.3.2.1 Filter Report Data

Layer data can be filtered using the “Value,” “Field,” or “Unique” options by selecting the corresponding radio button. Next, select desired filter criteria in the first dropdown. Then manually enter a value into the filter text box or selecting from a second dropdown menu, depending on the radio button selected. Click the “Ok” button. The system will display the data that matches the user entered filter criteria.

Filter

Add a filter expression

Add an expression set

Address (String)

is

is

is not

starts with

ends with

contains

does not contain

is blank

is not blank

Value

Field

Unique





Filter

+ Add a filter expression + Add an expression set

Address (String) contains 325

☒ Value ☐ Field ☐ Unique

☐ Case Sensitive

Food Banks, 2017		USDA Food Deserts	
 Options ▾		Filter by Map Extent	
		 Zoom to	 Clear Selection
		 Refresh	
Address		City	State
325 NW 10th Ave		Gainesville	FL

4.1.3.2.2 Remove Report Data Filter

To remove a filter, select the tab of the filtered layer data that needs to be removed and click the “Options” dropdown. Next click “Filter”. Then, click the “X” icon for the filter that is to be removed. Finally, click the “OK” button. The system will remove the filter and the layer tabular data will refresh displaying the layer data without the previous selected filter.

Food Banks, 2017
USDA Food Deserts

Options
Filter by Map Extent
Zoom to
Clear Selection
Refresh

☒ Show Selected Records
☐ Show Related Records
Filter
Show/Hide Columns
Export All to CSV

City
State

Gainesville
FL

Panama City Beach
FL

Melbourne
FL

Food Banks, 2017
USDA Food Deserts

Options
Filter by Map Extent
Zoom to
Clear Selection
Refresh

☒ Show Selected Records
☐ Show Related Records
Filter
Show/Hide Columns
Export All to CSV

City
State

Gainesville
FL

Panama City Beach
FL

Melbourne
FL

Filter

+ Add a filter expression + Add an expression set

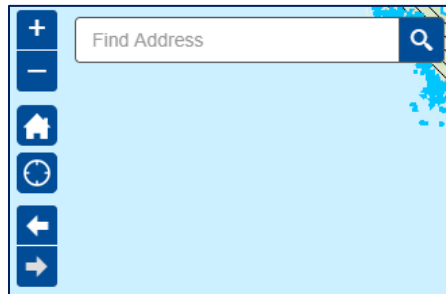
Address (String) contains 325




☒ Value ☐ Field ☐ Unique

☐ Case Sensitive

4.1.3.2.3 Filter Report Data by Map Extent

Another way users can filter the layer tabular data is by using the “Filter by Map Extent” option. The “Filter by Map Extent” option allows the user to filter the tabular data according to the current map zoom level. For example, if the map is zoomed into a limited area such as a city, the only tabular data that will display when the user selects “Filter by Map Extent” are the data points that are viewable on the map in the zoomed in view. To “Filter by Map Extent” first select the tab of the layer data to be filtered. Next, use the map controls to change the zoom level to capture the area of where data points exist and are desired to be displayed in the table. Then click the “Filter by Map Extent” button. The system will refresh the table of layer data displaying only the data points that exist in the user selected zoom level of the map. To clear the filter, click the “Filter by Map Extent” button. The table will refresh, all data for that layer. To manually refresh the table data for a layer, click the “Refresh” table button.



Food Banks, 2017		USDA Food Deserts		
 Filter by Map Extent		 Zoom to	<input checked="" type="checkbox"/> Clear Selection	 Refresh
Address		City	State	
1408 Morningside Dr		Melbourne	FL	
6928 Vickie Cir		West Melbourne	FL	
5259 W Cardinal St		Homosassa	FL	

4.1.3.3 Sort Report Data

Users can Sort Report data by clicking any column header in any layer data table and selecting the “Sort Ascending” or “Sort Descending” options.

Food Banks, 2017

USDA Food Deserts

Options

Filter by Map Extent

Zoom to

Clear Selection

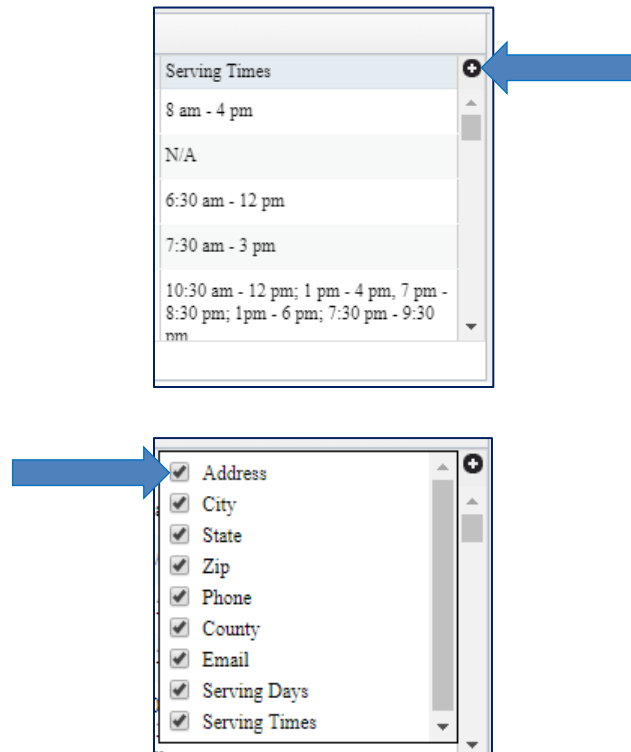
Refresh

Address	City	State
325 NW 10th Ave		FL
16610 Front Beach Rd	Panama City Beach	FL

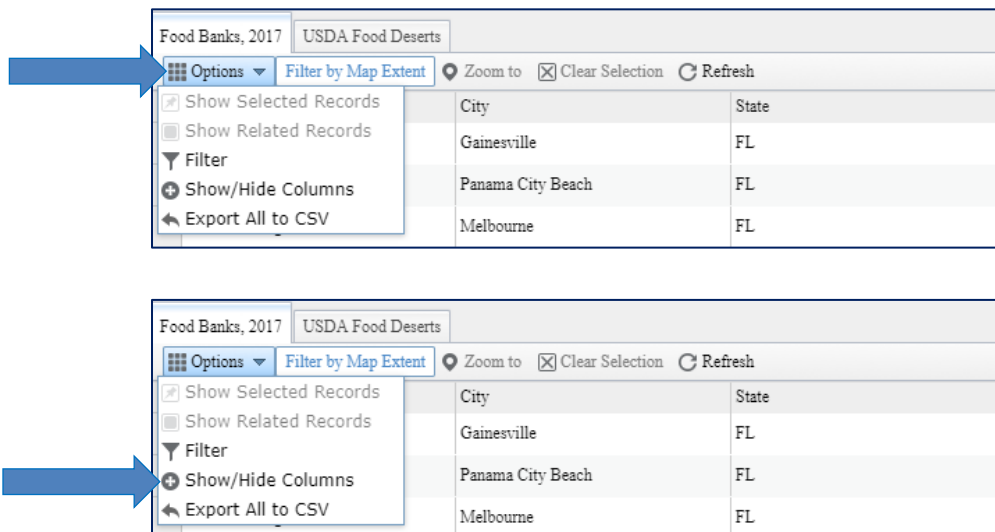
4.1.3.4 Show/Hide Report Data

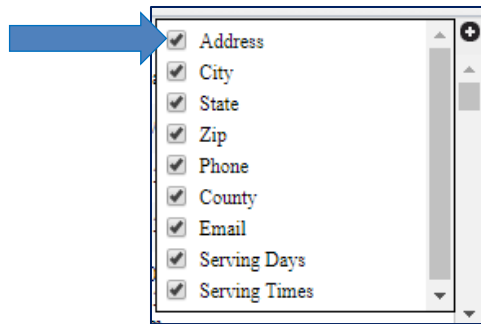
Users can Show/Hide any column for any report layer data table. There are two ways that this can be done. One way users can Show/Hide columns is to click the Show/Hide columns “+” icon at the top right of the report layer data table. A checkbox list will be displayed at the far right of the table containing each column header. To “Show” any column of data in the table, check the box for that column header. To hide a column of data,

deselect the checkbox of the column header of data to be hidden. To hide the checkbox list, simply click the Show/Hide icon “+”.



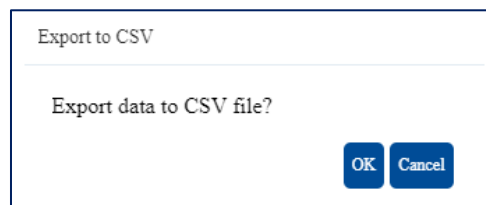
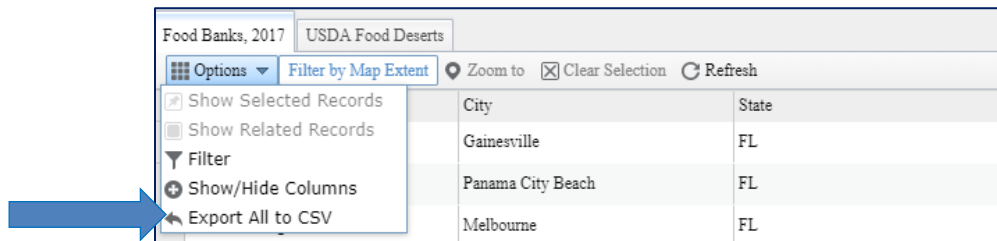
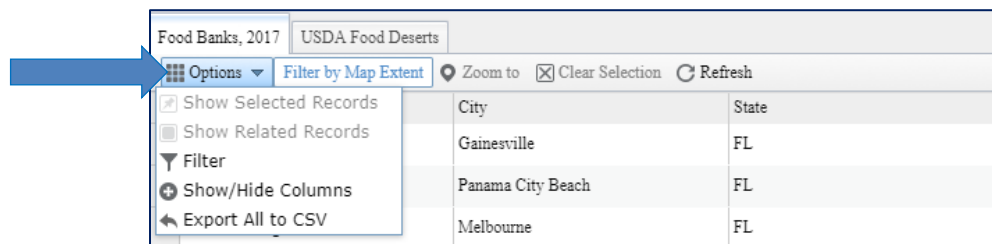
Another way users can access the Show/Hide list is to click the “Options” dropdown and then click the “Show/Hide Columns” option. The list will display to the far right of the table. To hide the “Show/Hide” list either click the “Option” button again or click the “+” Show/Hide icon in the far right corner of the table.





4.1.3.5 Export Report Data

Users can export Report data as a .csv file to a local drive. To export Report data to a local drive, first select the tab of the layer that is to be exported. Next, click the “Options” button. Then, click the “Export All to CSV” option. The system will display a message asking for confirmation that a user wants to export the data as a .csv file. If the user clicks the “Ok” button the layer will be exported as a .csv file to the users “Download” folder on their local machine. If the user clicks the cancel button, the system will close the “Export All to CSV” functionality and not download the report data.



5 Map

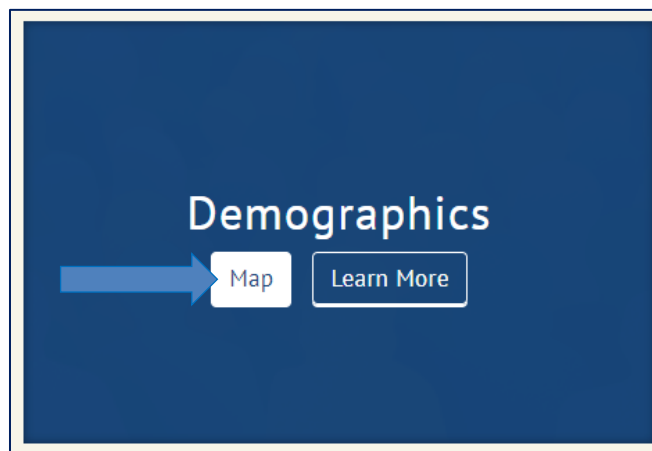
5.1 Map Section

5.1.1 Map Section Navigation

Users can navigate to the Map section of the Home page by selecting “Map” from the main menu or manually scrolling down the page

5.1.2 Map Section Tiles

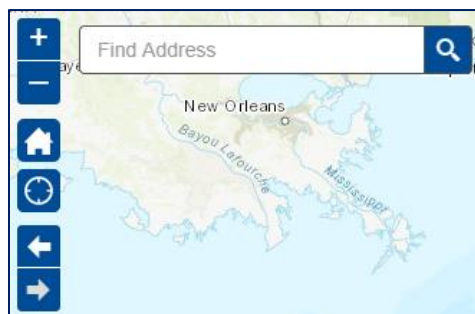
Each tile provides users the ability to view associated FDACS data layers on a map or read additional information about each theme. To view a theme based map, move the mouse pointer over any of the tiles and click the “Map” button. The system will display the map with associated theme FDACS layers preselected. To read more information about any of the themes, click the “Learn More” button on any of the theme tiles.



5.2 Map Module

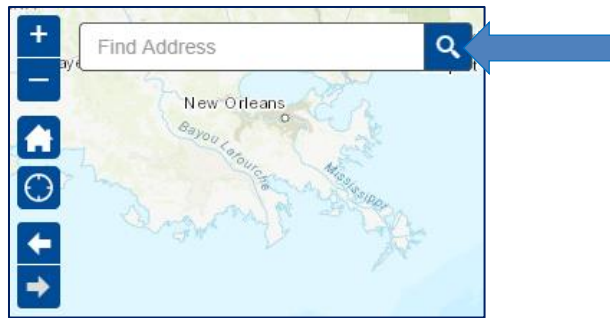
5.2.1 Map Controls

The map has a variety of controls to be used for navigation of the map. Map Controls include Zoom, Home, My Location, Previous and Next View. To pan the map, left click hold while moving the mouse.



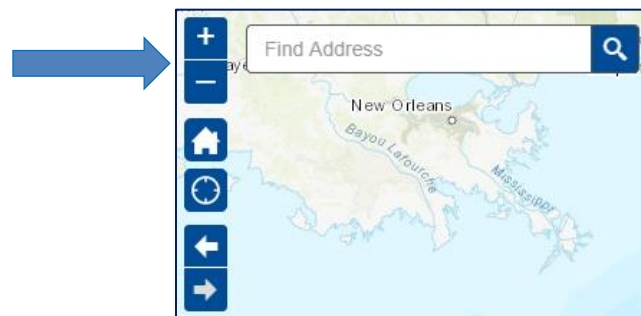
5.2.1.1 Search

There is a search window located in the top left corner of the map. To perform a search of the map, enter search criteria and click the search button. The system will display the search result on the map. Detailed information regarding map search can be found in “5.1.4 Search Map” section of this manual.



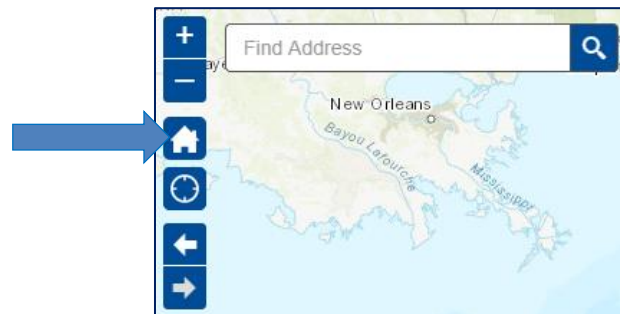
5.2.1.2 Zoom

Zooming of the map can be accomplished by using the zoom in "+" and zoom out "-" buttons at the top left corner of the map. Also, scrolling the mouse wheel with the mouse pointer over the map will also zoom the map. Scrolling up will zoom in while scrolling down will zoom out.



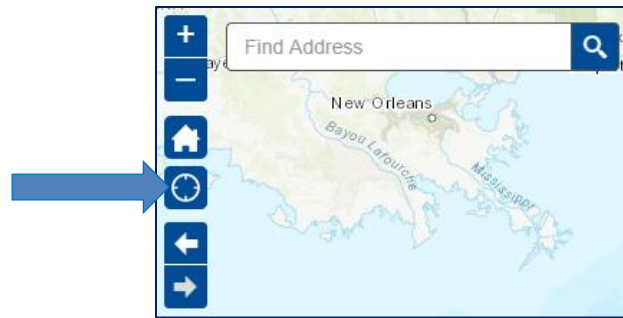
5.2.1.3 Home

To return to the zoomed out default view of the map, click the "Home" button located on the left side of the map under the zoom control buttons.



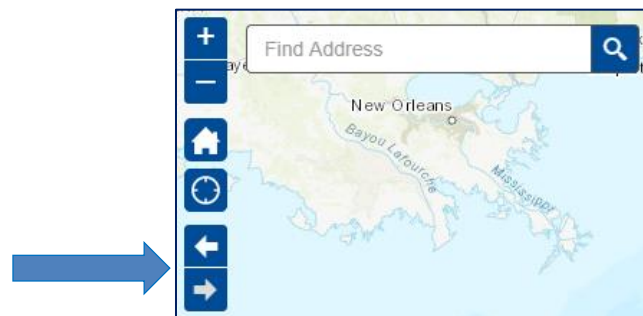
5.2.1.4 My Location

The home button located on the left side of the map under the "Home" button is for users to see their current location on the map. Users can pan and zoom the map to their location by clicking the "Home" button. A pop up confirmation message requesting users to allow their location to be known by the application will appear. To agree and use the home function click the "Allow" button. To cancel this function, click the "Deny" button.



5.2.1.5 Previous/Next View

Users can use the previous and next view buttons to cycle through different views of the map that were done during their session on the map page. These buttons are located on the left hand side of the map under the “My Location” button.



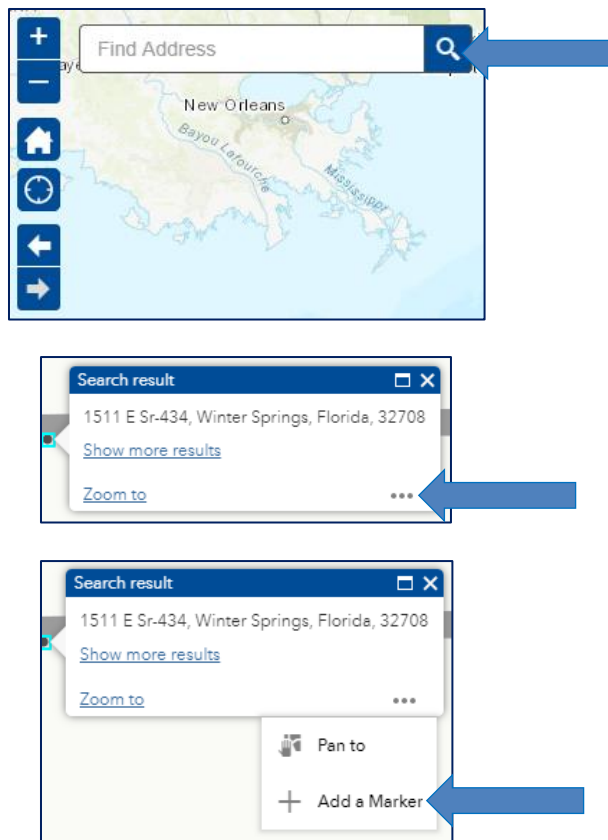
5.2.1.6 Map Overview

The Map Overview is located in the bottom right corner of the map and is a tool used to pan the map in an efficient manner. The map overview box displays the map at a more zoomed out level than the main map. To use the map overview, click and drag the gray box while holding down the mouse button to the desired area the main map to pan to and release the mouse button. The system will pan the main map to that location.

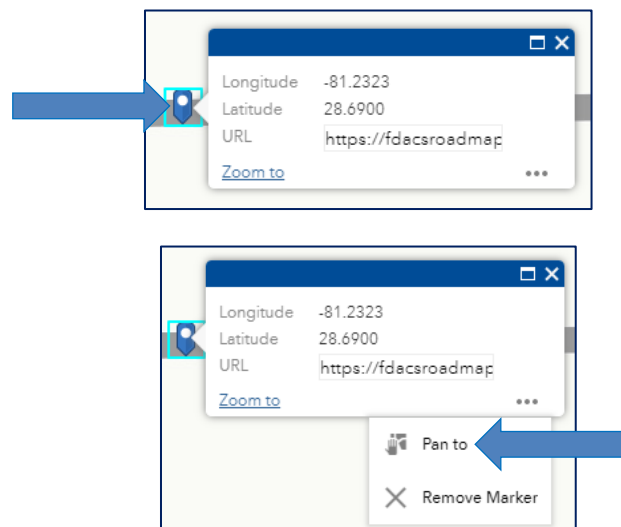


5.2.2 Search Map

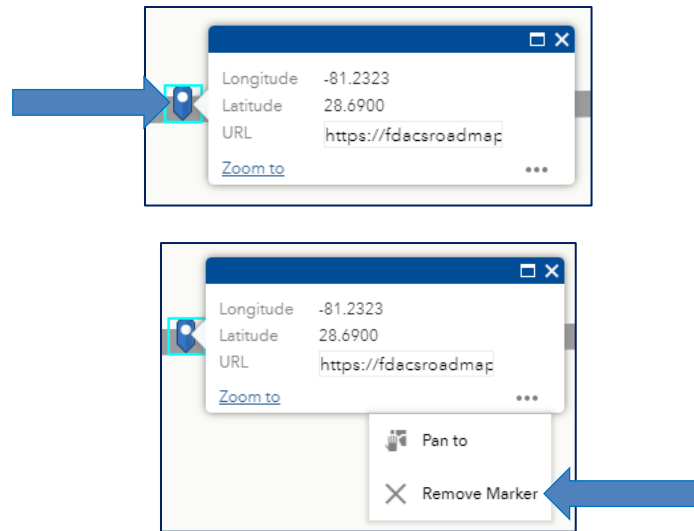
Users can search the map using the search window at the top left corner of the map. In the search window, enter the search attributes into the text box and click the search button. The system will zoom into the searched location and highlight the location and display the search result in text box. To add a marker at the searched location, click the “...” menu icon in bottom right hand of the corner of the information window and click “Add a marker”.



Users can click on the marker and see the latitude and longitude of the marker. Also, a URL is provided that the user can note and copy into their web browser for future use that will take them to a zoomed view of that searched location. To pan to the marker and center on the user's screen, click the "... " menu icon in the bottom right hand corner of the information window and click "Pan to".



To remove a marker, click the "... " menu icon in bottom right hand of the corner of the information window and click "Remove a marker". Finally, to close the text box, click the "X" button.



5.2.3 Maps Gallery

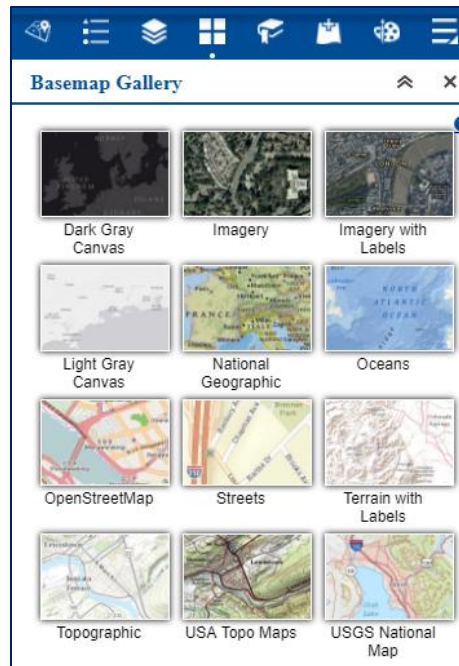
Maps Gallery is a collection of themed maps in an ArcGIS online or portal for ArcGIS Road Map to Living Healthy group. Users can navigate from here to the Open Data website by clicking the “Open Data” button. To view more detailed information regarding the theme map click the “Map Details” button. To view the themed map, click the “Load Map” button and the system will display the themed map.



5.2.4 Basemap Gallery

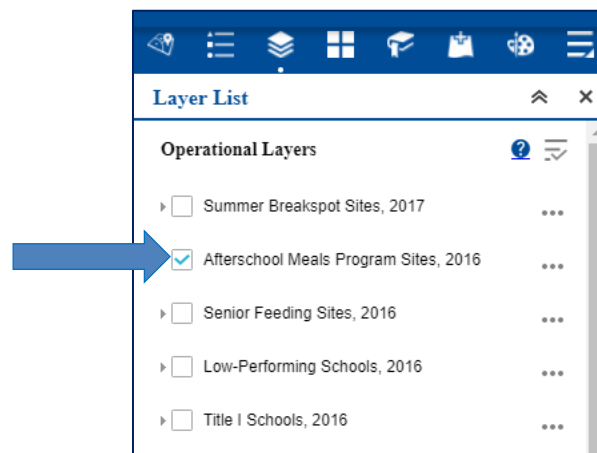
The Basemap Gallery is where users can select the type of basemap to use while viewing the map. The available different types of basemaps available include Dark Gray Canvas, Imagery, Imagery with Labels, Light Gray Canvas, National Geographic, Oceans, OpenStreetMap, Streets, Terrain with Labels, Topographic, USA Topo Maps and USGS National Map. Click the desired basemap to display on the screen while viewing the map.

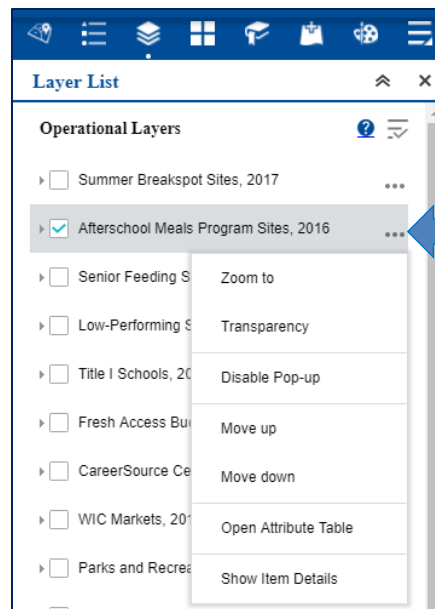




5.2.5 View Map Layers

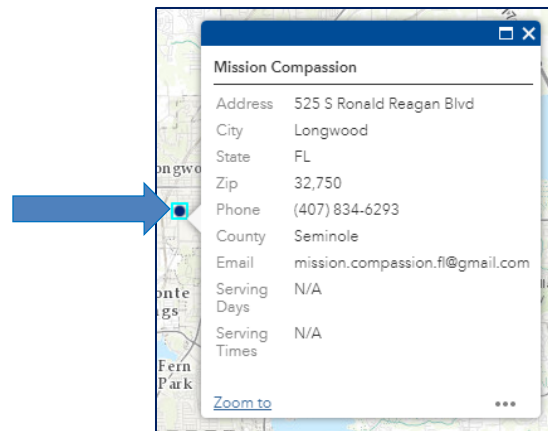
The layer list provides a list of operational layers and their symbols. To view one or multiple layers on the map, click the “Layers List” icon in the map menu located above the top right corner of the map. Next, select any layers to be viewed by selecting the checkbox to the left of each available layer title. Other options available to the user for viewing a layer from clicking the “...” under the layer menu are “Zoom To” which will zoom the map to the selected layer, “Move Up or Move Down” which will change the order of layers in the layer list and “Open Attribute Table” which will open the selected layer’s data in a tabular view.





5.2.6 View Map Details

To view details of any data point on the map, click the data point and the system will display a window with more detailed information regarding the data point.



5.2.7 Map Legend

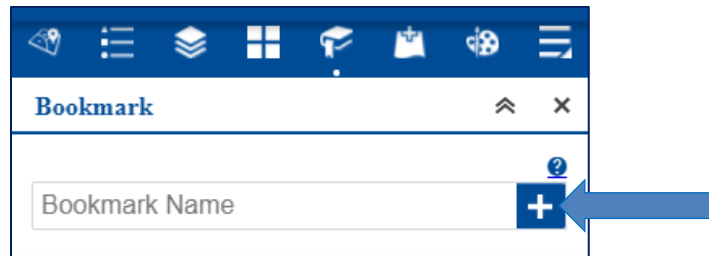
To view the legend for all selected layers, click the “Legend” button on the map menu located above the top right corner of the map.



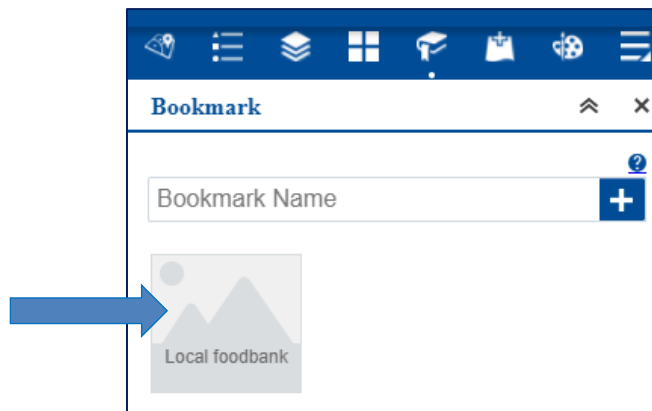
5.2.8 Map Bookmarks

Users can save a collection of map view extents (spatial bookmarks) in the application by creating bookmarks. To create a bookmark, search or zoom to the desired level of the map of the area you want to save. Next, click the “Bookmark” icon from the map menu located above the top right corner of the map. Then, enter a name for the bookmark in the “Bookmark Name” box. Lastly, click the “+” button and the bookmark will be saved with the name that was given.





To delete a bookmark, select the bookmark that is to be deleted and click the “Delete” button at the bottom right of the Bookmark area.



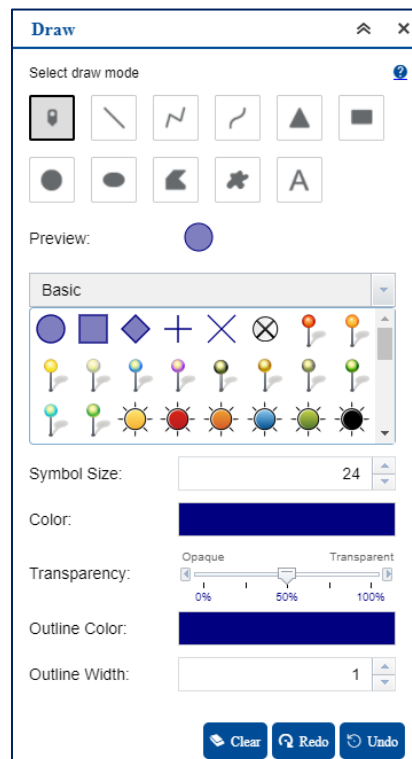
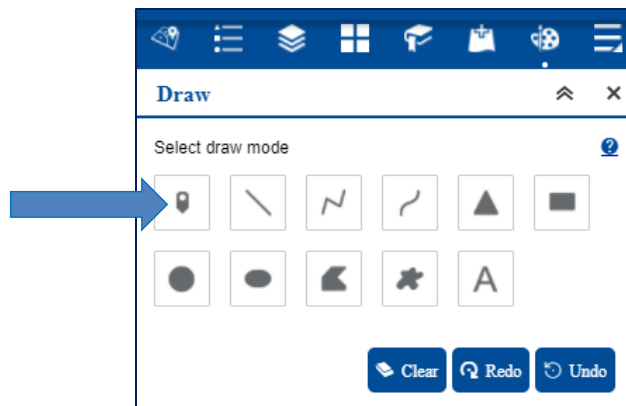
5.2.9 Draw On Map

The Draw functionality enables users to draw graphics and write text on a map. Users can draw points, lines and/or polygons.



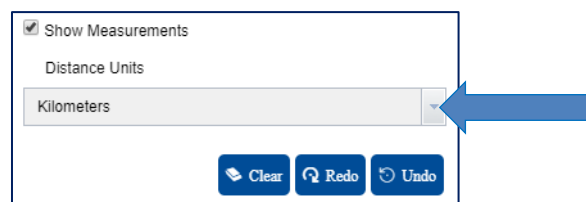
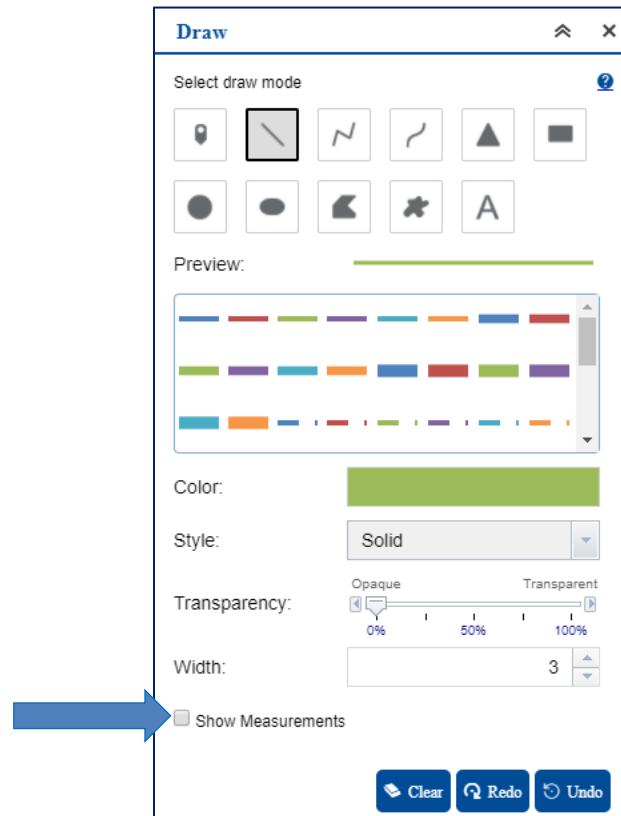
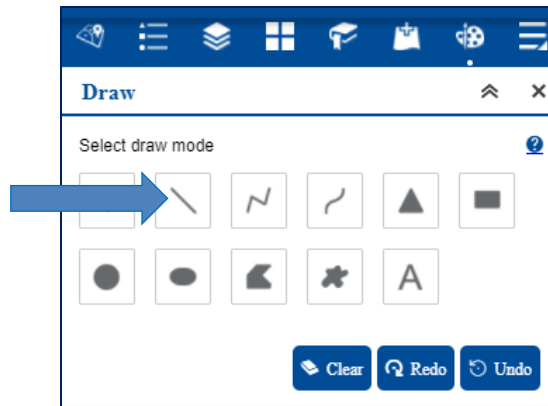
5.2.9.1 Points

To draw a point, select “Point” from the available draw mode choices at the top of the “Draw” menu. Next, select a category by clicking the “Shapes” dropdown and clicking a category title. Then click the symbol to use. There other options that can be adjusted for the selected symbol are symbol size, color, transparency, outline color and outline width. There is a preview feature provided to see what the symbol will look like with the user selected design options. Once all desired symbol options are selected click anywhere on the map to place the symbol. If the symbol placed on the map needs to be removed, click the “Undo” button at the bottom of the draw menu.



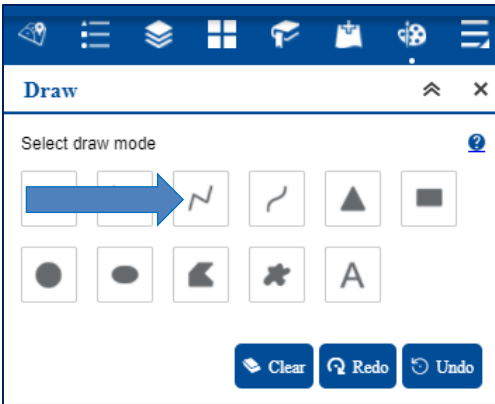
5.2.9.2 Lines

There are three types of lines for users to choose. Line, Polyline and Freehand Polyline. To draw a line, select “Line” from the available draw mode choices at the top of the “Draw” menu. Next, select a style in the style box below “Preview” or change the style by clicking the style dropdown below the style box and choosing the style type from the list. There other options that can be adjusted for the line which are color, transparency and line width. Also, there is a box that can be checked that will display the measurement length of the line if selected on the map. The distance unit choices include kilometers, miles, meters, feet, yards and nautical miles. There is a preview feature provided to see what the line will look like with the user selected design options. Once all desired line options are selected, click and hold anywhere on the map and drag the mouse to draw the desired length of the line and then release the mouse button. If the line placed on the map needs to be removed, click the “Undo” button at the bottom of the draw menu.



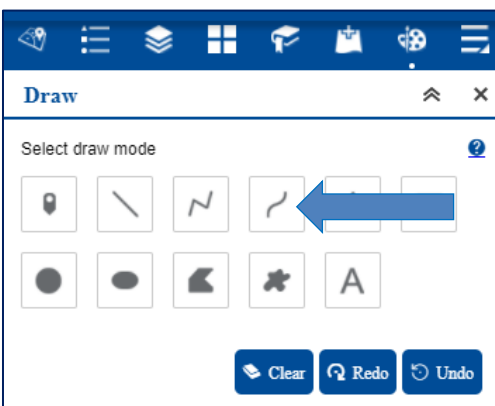
5.2.9.3 Polyline

The difference between a Polyline and a Line is how they're drawn. To draw a polyline select "Polyline" from the draw mode options and click anywhere on the map. Next, click another location on the map and the system will draw a line between the two points. To finish drawing the line double click on the map where you want the line to end. Polylines have all the same design options as a line. Please refer to section 5.2.4.2 in this manual for detailed information regarding design options.



5.2.9.4 Freehand Polyline

Freehand Polygons are drawn slightly different as well. To draw a “Freehand Polygon” select “Freehand Polygon” from the draw mode options and click anywhere on the map and continue to hold down the mouse button while dragging the mouse to freehand draw the line. To complete the drawing of the line release the mouse button. “Freehand Polygons” have all the same design options as a “Line”. Please refer to section 5.2.4.2 in this manual for detailed information regarding design options.



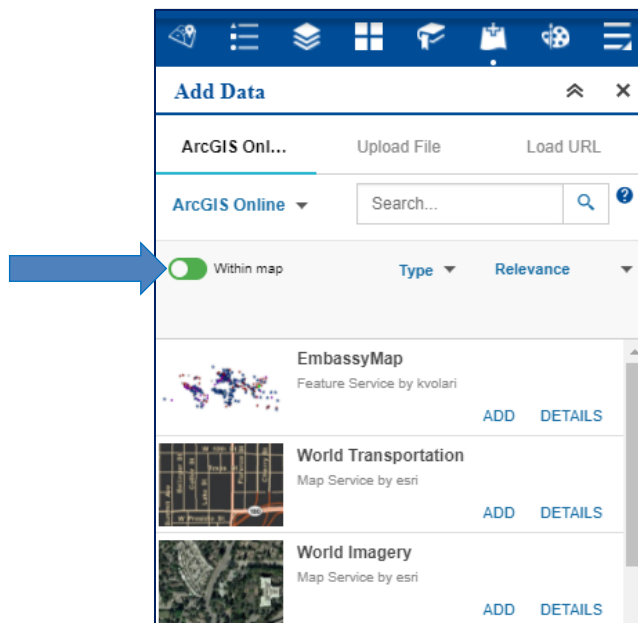


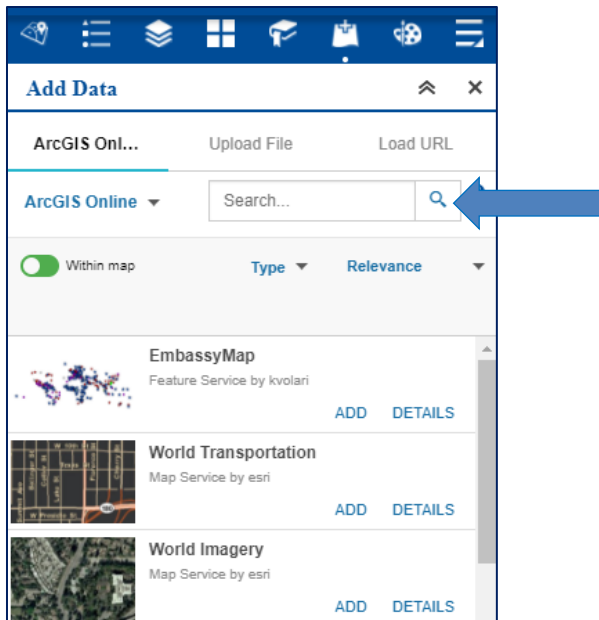
5.2.10 Map Analysis

Users can upload or analyze additional data on the map of the Roadmap application. There are three different options for the users to analyze other data in the application other than the available FDACS available layers.

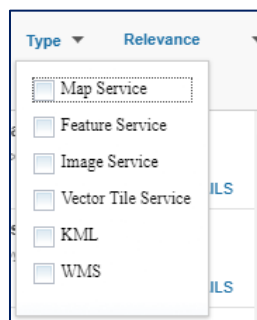
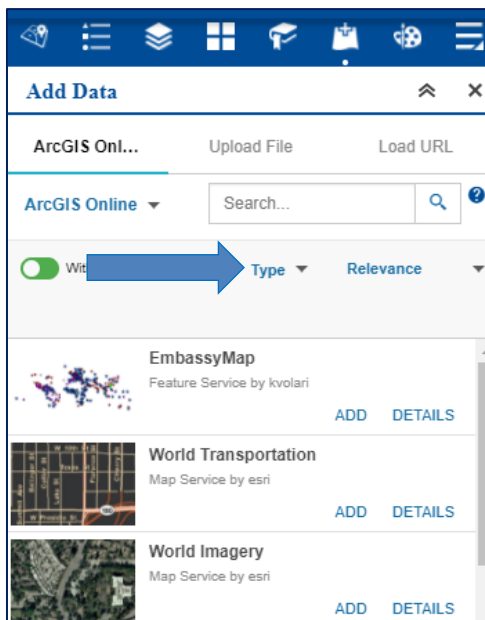
5.2.10.1 ArcGIS Online

Users can load any public ArcGIS online or Portal for ArcGIS content into the map. To load content into the map, click the “Add Data” button in the map menu located above the top right hand corner of the map. The “Add Data” menu will appear on the map. To search for layers that only pertain to the map boundary (Florida) make sure the “Within Map” selection is set to on (Highlighted Green). To search for layers outside of the map boundary turn “Within map” off (Highlighted Red). Users can then search for layers they wish to view by entering search criteria into the search window and clicking the search button. The system will return all results that match the search criteria as a list.

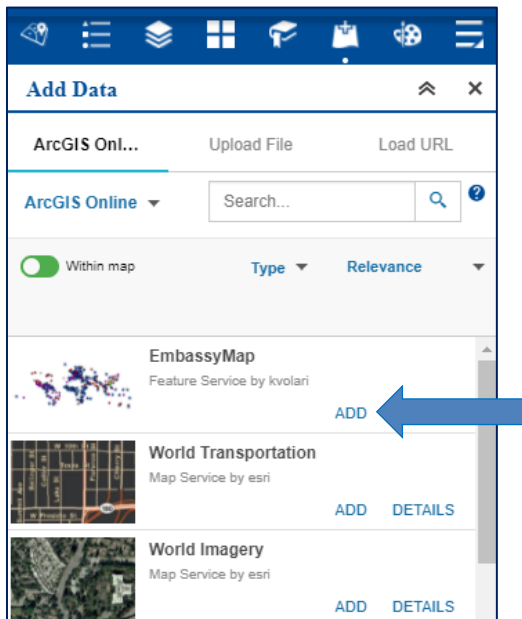




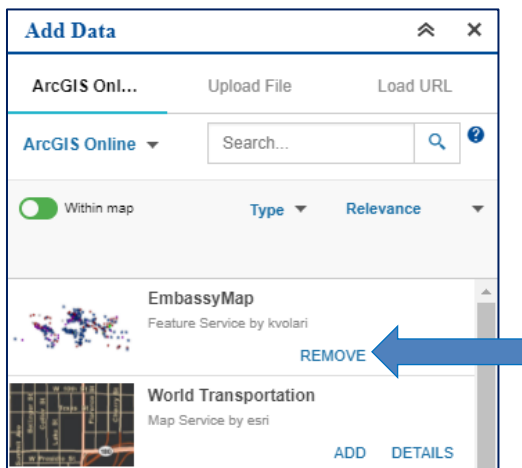
Users can filter the search results by Type or Relevance. To filter the list, click the dropdown for “Type” and/or “Relevance” and select filtering criteria to refine the search.



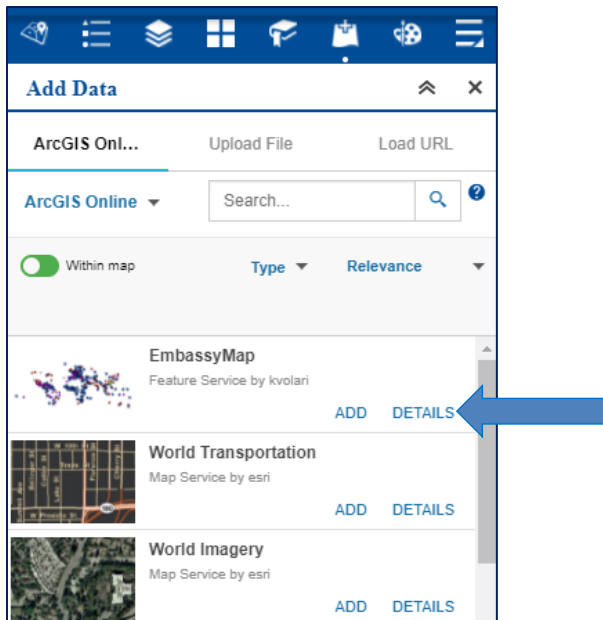
To add a layer to the map, click “Add” for that layer. The system will display the layer on the map and add the layer to the “Layers” list as well.



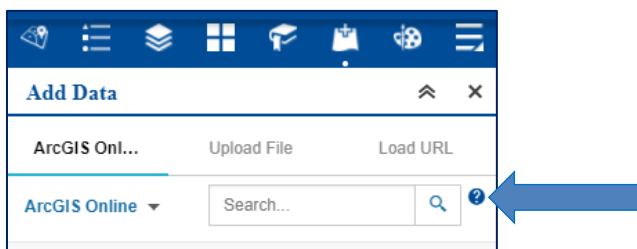
To remove the added layer, click “Remove” for the layer that was added.



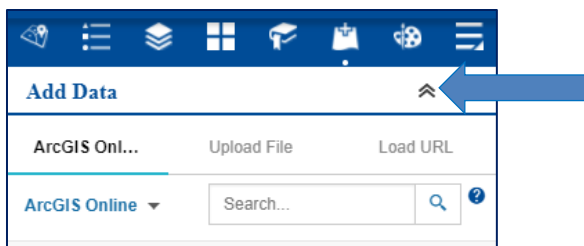
To view additional details about the layer, click “Details” for that layer.



To view instructions on using this section, click the information icon to the right of the search text box.



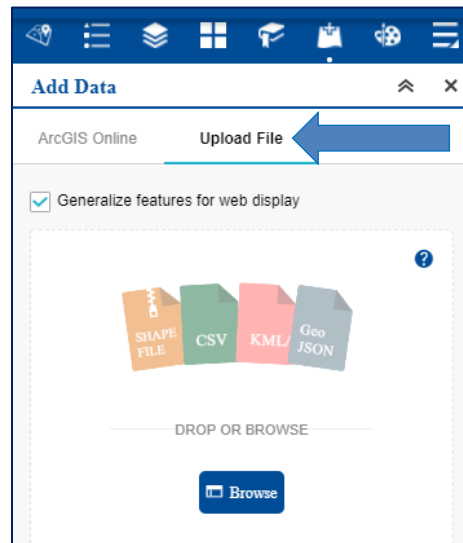
To minimize the Add Data window click the expand/minimize icon in the top right corner of the “Add Data” window.



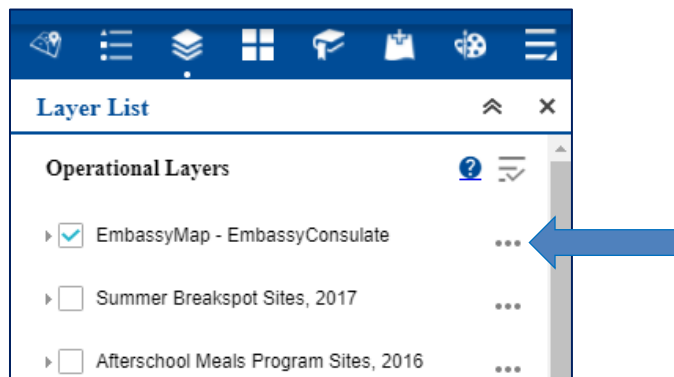
To close the Data window click the close button in the top right corner of the “Add Data” window.

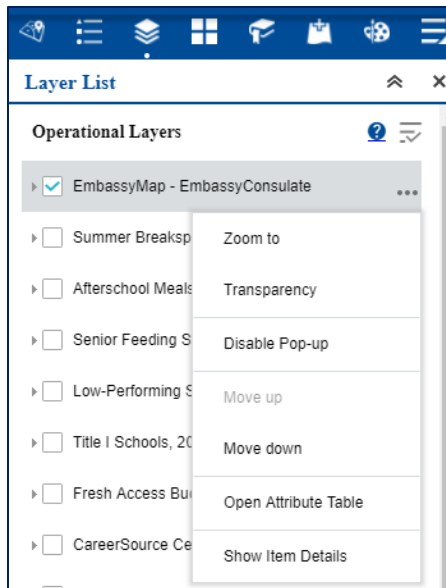
5.2.10.2 Upload Data File

The types of data files that users can upload for analyses by drag and drop or browse include Shape, CSV, KML/KMZ and Geo JSON. To upload a data file, click the “Add Data” button from the map menu located above the right top corner of the map. Then click the “Upload File” tab. Next, drag and drop a file into the designated drop area or browse for a file to upload by clicking the “Browse” button and selecting the file you want to import and click the “Open” button. The system will import the file and display the layer in the Layer list and legend. *Note: There is a 5 MB size limitation for each uploaded file.



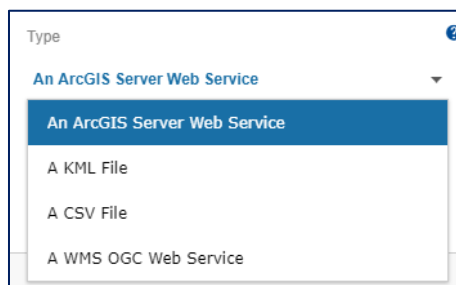
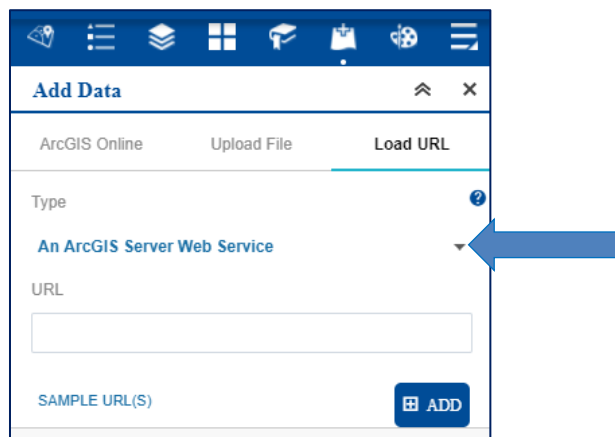
To manage the imported layer click the “Layer List” button in the map menu located above the top right corner of the map. Next, click the “...” menu icon for that layer. This is where the user can choose different options such as zoom to the layer data on the map, adjust the transparency of the data on the map, move the layer up or down the layer list and open the attribute data for that layer in a table.



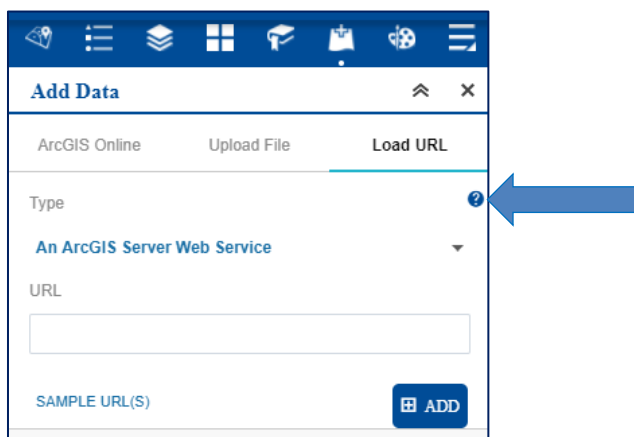


5.2.10.3 Load URL

This option allows users to load data to the map by URLs. To load data, first select the data format type by clicking the “Type” dropdown and selecting one of the available choices. Next, copy and paste the URL into the URL text box and then click the “Add” button. The system will then display the data on the map. The layer will also be available for users to manage in the Layer list and viewable in the Legend. To view instructions on how to use the URL functionality click the information icon on the “Load URL” tab. To view instructions regarding added data layer management, please refer to section 5.1.5.2 in this user manual.



To view instructions on how to use the URL functionality click the information icon on the “Load URL” tab. To view instructions regarding added data layer management, please refer to section 5.1.5.2 in this user manual.

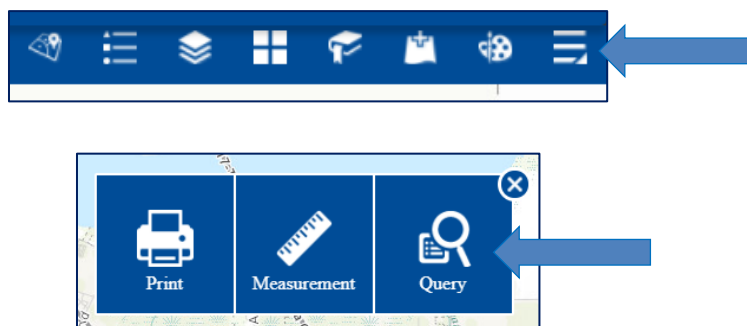


5.2.11 Query Map

The Query Map function enables users to search layers visible on the map by Area of Interest. This is performed by either a text search, selection of an area using drawing or by a boundary selection.

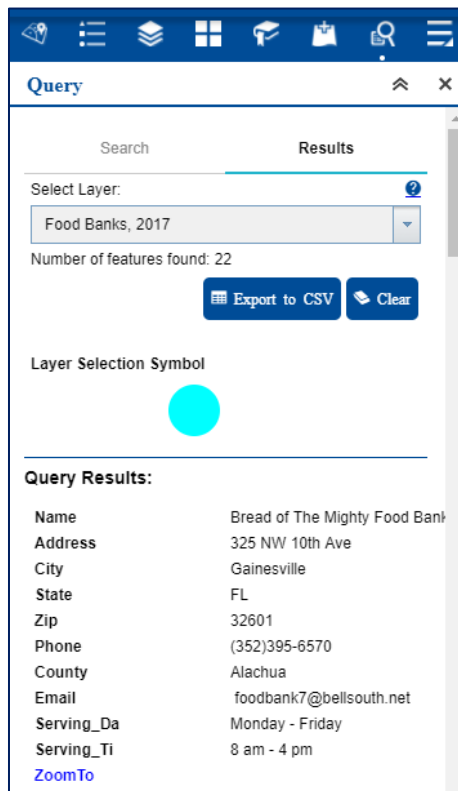
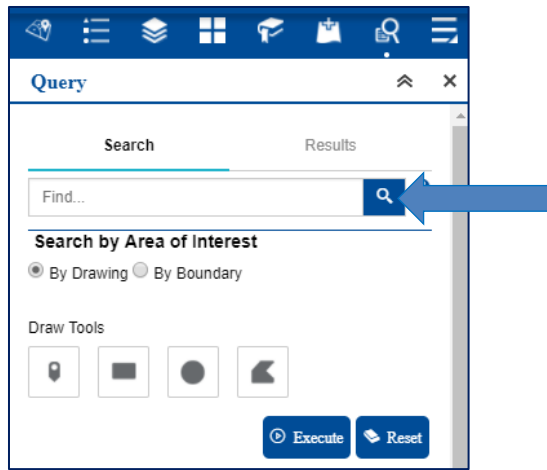


If the Query Map option is not immediately available in the icons shown, click the “more” menu option on the right and then select “Query.”

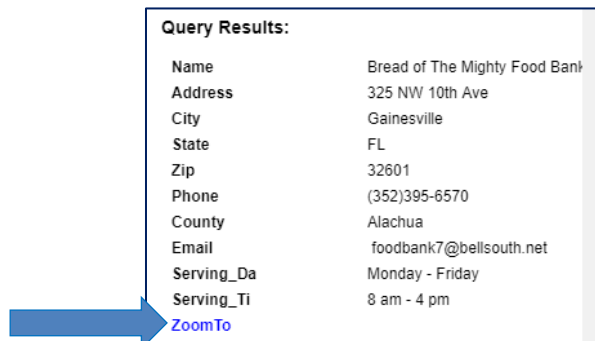


5.2.11.1 Text Search Query

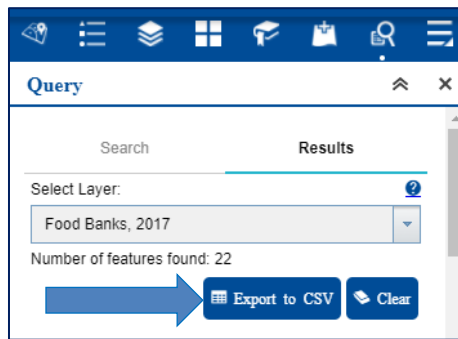
To perform a query using text search, enter the search criteria into the search window and click the “Search” button. The system will highlight the data points on the map that match the search criteria and display the “Results” tab with a list of all the detailed information for each data point in a scrollable list.



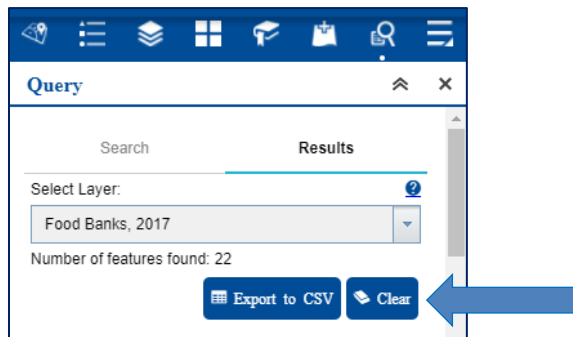
To zoom in on a specific data point click “Zoom To” for that data point.



To export the search results, click the “Export to CSV” button.

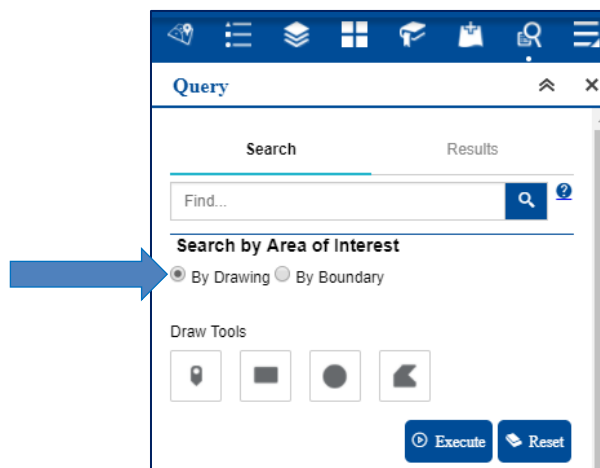


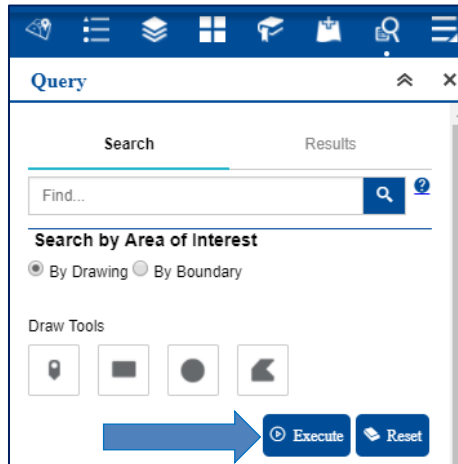
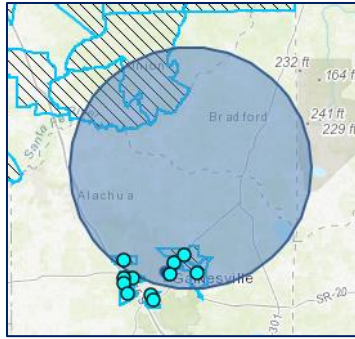
To clear the search results, click the “Clear” button on the “Results” tab of the Query window.



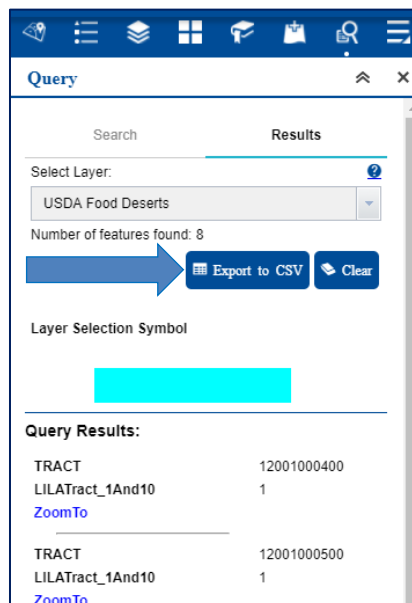
5.2.11.2 Drawing Selection Query

To select an Area of Interest by drawing, click the radio button for “By Drawing” on the “Search” tab of the Query window. Then select one of the drawing shapes and click and drag holding the mouse button to draw the shape encapsulating all the data points of the area of interest. Next, click the “Execute” button.

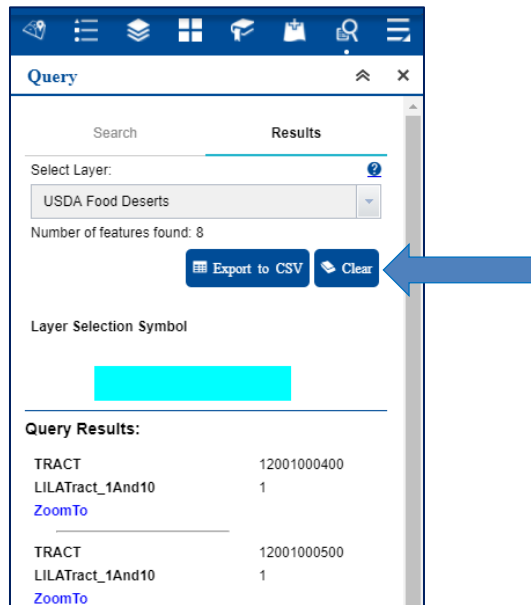




The system will display the results in the “Results” tab of the Query window. To export the search results, click the “Export to CSV” button.

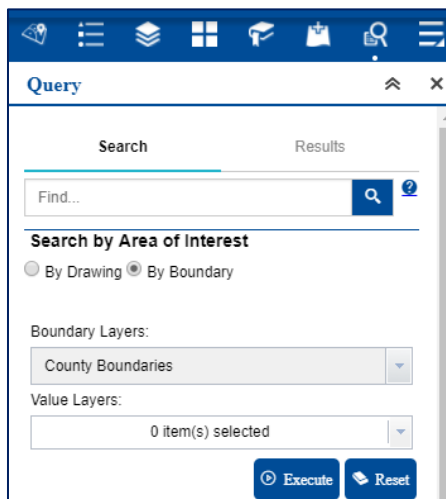


To clear the results, click the “Clear” button on the “Results” tab of the Query window.



5.2.11.3 Boundary Selection Query

To perform a query using Boundary selection, click the radio button for “By Boundary” on the “Search” tab of the Query window. Next, click the dropdown for “Boundary Layers”, select a boundary layer and click the execute button. The results will display in the “Results” tab of the Query window. To export the search results, click the “Export to CSV” button. To clear the search results, click the “Clear” button on the “Results” tab of the Query window.

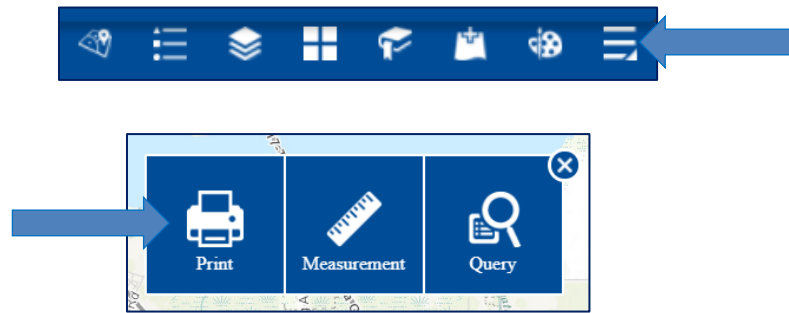


5.2.12 Print Map

To print a map, click the “Print” icon from the map menu located above the top right corner of the map.

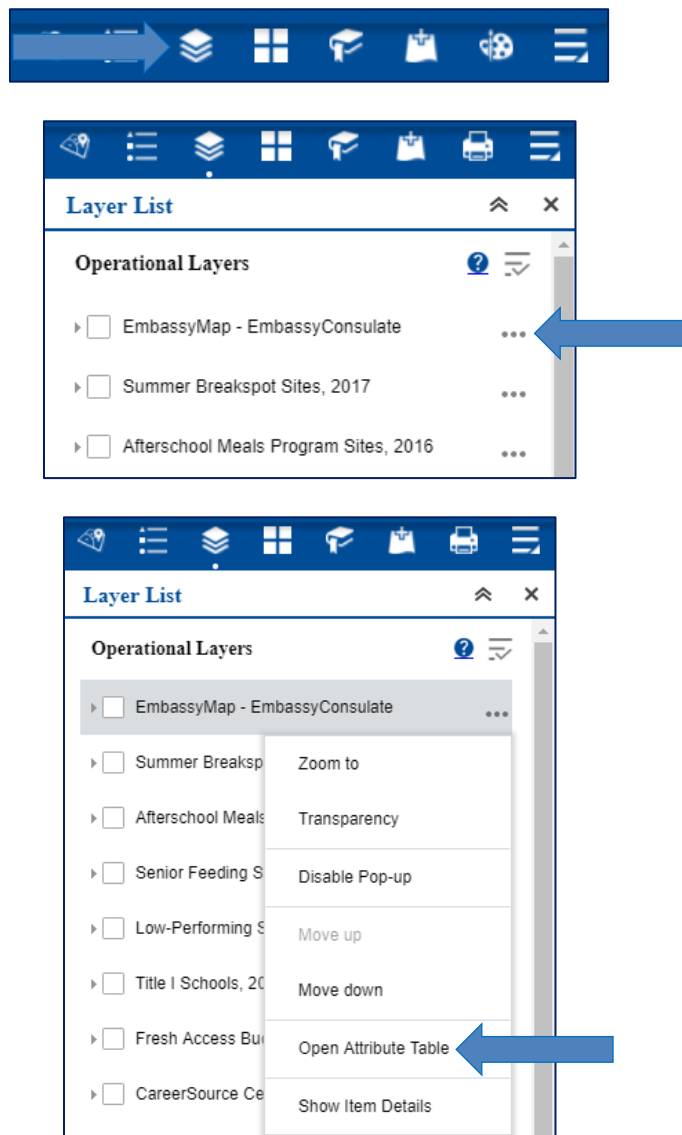


If the Query Map option is not immediately available in the icons shown, click the “more” menu option on the right and then select “Query.”



5.2.13 Export Map Layer Data

Users can export map layer data as a .csv file to a local drive. To export map layer data, first click the menu icon “...” for the layer to be exported in the layer list and click “Open Attribute Table”. A table containing the selected layer will be displayed at the bottom of the map.



5.2.13.1 Exporting All Data of a Layer

Verify that the “Filter by Map Extent” option is NOT activated or it’s possible that not all the layer data will be exported depending on the zoom level of the map. Next, click the “Options” button. Then, click “Export All to CSV”. The system will display a message asking for confirmation for the user to verify they want to export the data as a .csv file. If the user clicks the “Ok” button, the layer will be exported as a .csv file to the user’s “Download” folder on their local machine. If the user clicks the cancel button, the system will close the “Export All to CSV” functionality and not download the report data.

*Note: The attribute table can be expanded by clicking and dragging up the top edge of the table or be hidden by clicking the “Hide Attribute Table” arrow at the center top edge of the table.

The first screenshot shows a table with three columns: Address, City, and State. The table contains three rows of data. The 'Options' button is highlighted with a blue arrow.

Address	City	State
325 NW 10th Ave	Gainesville	FL
11730 Old Saint Augustine Rd	Jacksonville	FL
258 NW Burk Ave	Lake City	FL

The second screenshot shows the same table, but the 'Options' button is now open, showing a dropdown menu with the following options: Show Related Records, Filter, Show/Hide Columns, and Export All to CSV. The 'Export All to CSV' option is highlighted with a blue arrow.

The third screenshot shows the 'Export to CSV' dialog box. It contains the text 'Export data to CSV file?' and two buttons: 'OK' and 'Cancel'.

5.2.13.2 Exporting Layer Data Filtered by Map Extent

Verify that the “Filter by Map Extent” option is activated and that the zoom level of the map displays the desired data points on the map. Next, click the “Options” button. Then, click “Export All to CSV”. The system will display a message asking for confirmation for the user to verify they want to export the data as a .csv file. If the user clicks the “Ok” button, the layer will be exported as a .csv file to the user’s “Download” folder on their local

machine. If the user clicks the cancel button, the system will close the “Export All to CSV” functionality and not download the report data. The export will only contain data for the data points that are displayed on the map.

*Note: The attribute table can be expanded by clicking and dragging up the top edge of the table or be hidden by clicking the “Hide Attribute Table” arrow at the center top edge of the table.

Food Banks, 2017	USDA Food Deserts	EmbassyMap - EmbassyConsulate	×
<div> Options Filter by Map Extent Clear Selection Refresh </div>			
Address	City	State	
325 NW 10th Ave	Gainesville	FL	
16610 Front Beach Rd	Panama City Beach	FL	
1408 Morningside Dr	Melbourne	FL	

Food Banks, 2017	USDA Food Deserts	EmbassyMap - EmbassyConsulate	×
<div> Options Filter by Map Extent Zoom to Clear Selection Refresh </div>			
Address	City	State	
325 NW 10th Ave	Gainesville	FL	
11730 Old Saint Augustine Rd	Jacksonville	FL	
258 NW Burk Ave	Lake City	FL	

Food Banks, 2017	USDA Food Deserts	EmbassyMap - EmbassyConsulate	×
<div> Options Filter by Map Extent Zoom to Clear Selection Refresh </div>			
<div> <input type="checkbox"/> Show Related Records <div> Filter Show/Hide Columns Export All to CSV </div> </div>	City	State	
	Jacksonville	FL	
	Jacksonville	FL	
1502 Jessie St	Jacksonville	FL	

Export to CSV

Export data to CSV file?

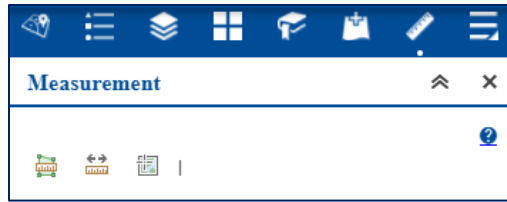
OK

Cancel

5.2.14 Map Measurement Tool

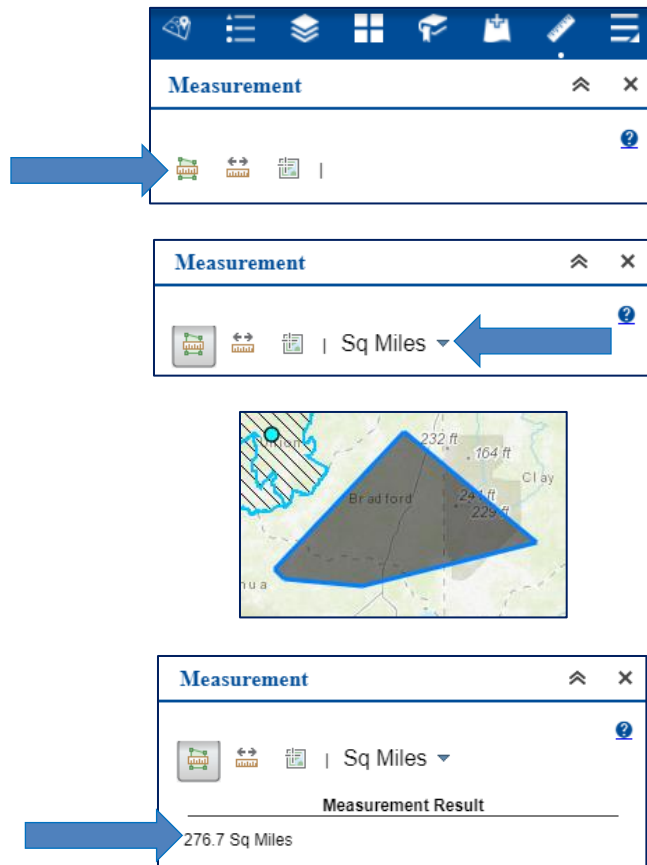
The map module includes a map measurement tool. To use the map measurement tool, select the “Measurement” icon from the main map menu above the top right corner of the map. There are three options for the “Measurement” tool which are measure area, measure distance or view location.





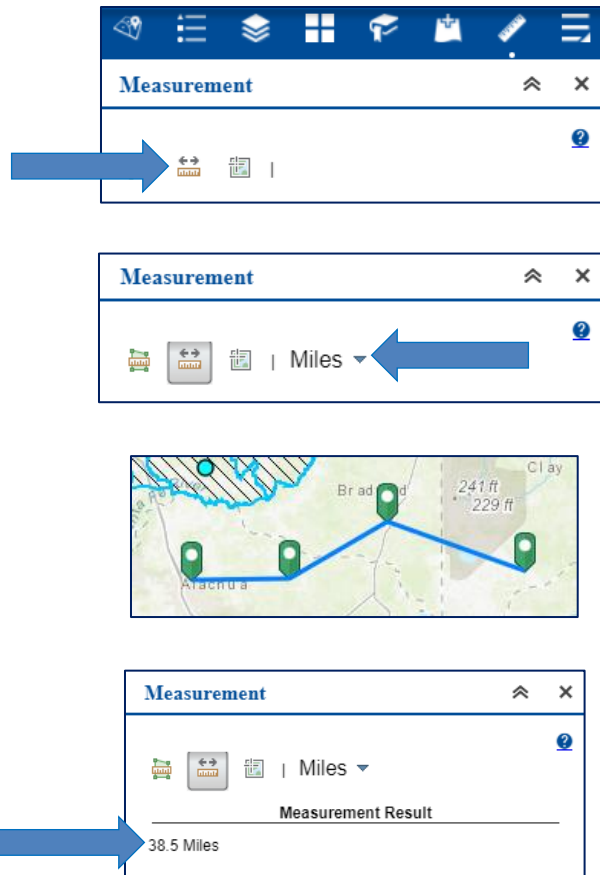
5.2.14.1 Measure Area

To measure an area on the map click the “Area” icon from the “Measurement” tool menu. Next, select the unit of measurement to use. The available choices are Square Miles, Square Kilometers, Hectares, Square Yards, Square Feet, Square Feet US and Square Meters. Then, click anywhere on the map. Then drag the line (NOT holding down the mouse button) to another area and click again. Continue these steps until a shape is drawn covering the part of the map that is to be measured. Double click to stop drawing at your final point. The system will display the square area in the “Measurement Result” section of the “Measurement” window. To clear the measured area, click the “Area” icon from the “Measurement” tool menu.



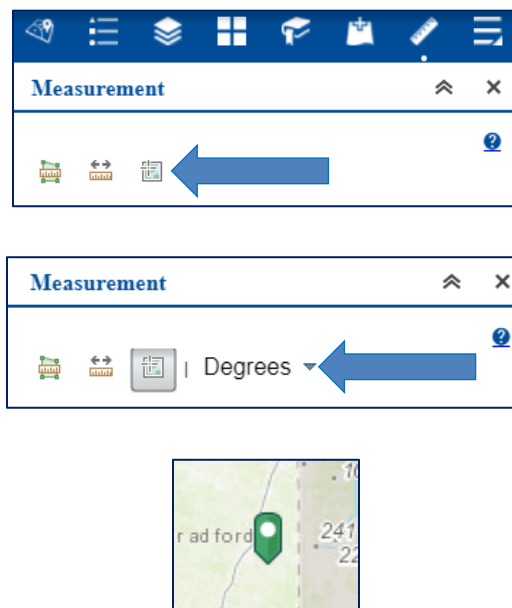
5.2.14.2 Measure Distance






To measure distance on the map click the “Distance” icon from the “Measurement” tool menu. Next, select the unit of measurement to use. The available choices are Miles, Kilometers, Feet, Feet US, Meters, Yards and Nautical Miles. Then click anywhere on the map. Next, drag the line (NOT holding down the mouse button) to the end point of the measurement and double click. The system will display the results in the “Measurement Result” section of the “Measurement” window. To clear the measurement, click the “Distance” icon from the “Measurement” tool menu.



5.2.14.3 Display Location

To display the location of a point on the map, click the “Location” icon on the “Measurement” tool menu. Then, select how you would like to see the location. The available choices are in degrees or degrees/minutes/seconds. Next, click a point on the map. The results will be displayed in the “Measurement Result” section of the “Measurement” window. The system also displays the location of your mouse pointer as you move it anywhere over the map in the “Measurement Result” section.



Measurement ⌵ ✕		
   Degrees ▾ ?		
Measurement Result		
	Latitude	Longitude
	30.478291	-80.723564
	29.915686	-82.088615

6 Engagement

6.1 Engagement Section

6.1.1 Surveys, Feedback & Testimonials

To navigate to the Engagement section of the Homepage, click “Engagement” from main menu located at the top of the Homepage or manually scroll down the page until the Engagement section is reached.

6.1.2 Take Survey

To participate in a survey, click “Take a Survey” for any survey on the “Surveys” list.

Surveys		
Survey Name	Status	Action
Reviewer_Testimonial_Survey	Active	Take Survey
Conditional Survey	Active	Take Survey
Showing 1 to 2 of 2 entries		

6.1.3 Feedback

To participate in providing feedback navigate to the Engagement section of the Homepage and click the “Continue” button for Feedback. A feedback form will pop up. Fill out the form and click the “Submit” button.



How did you hear about Roadmap?

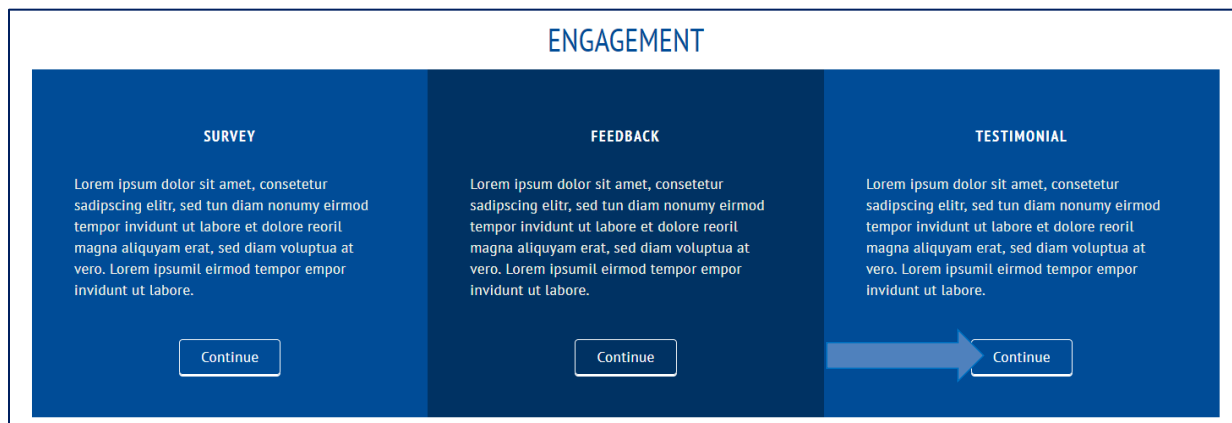
☐ Internet
☐ Friends
☐ Others

What did you find most useful on Roadmap website

Comments and recommendations

6.1.4 Testimonials

Users can provide a testimonial for the application. To provide a testimonial navigate to the Engagement section of the Homepage and click the continue button for Testimonials. There the user will see previously submitted testimonials by other users. To submit a testimonial, click the “Add Testimonial” button, fill out the form and click the “Submit” button.



Rate Us

✕

★ ★ ★ ★ ★

Comments

Name

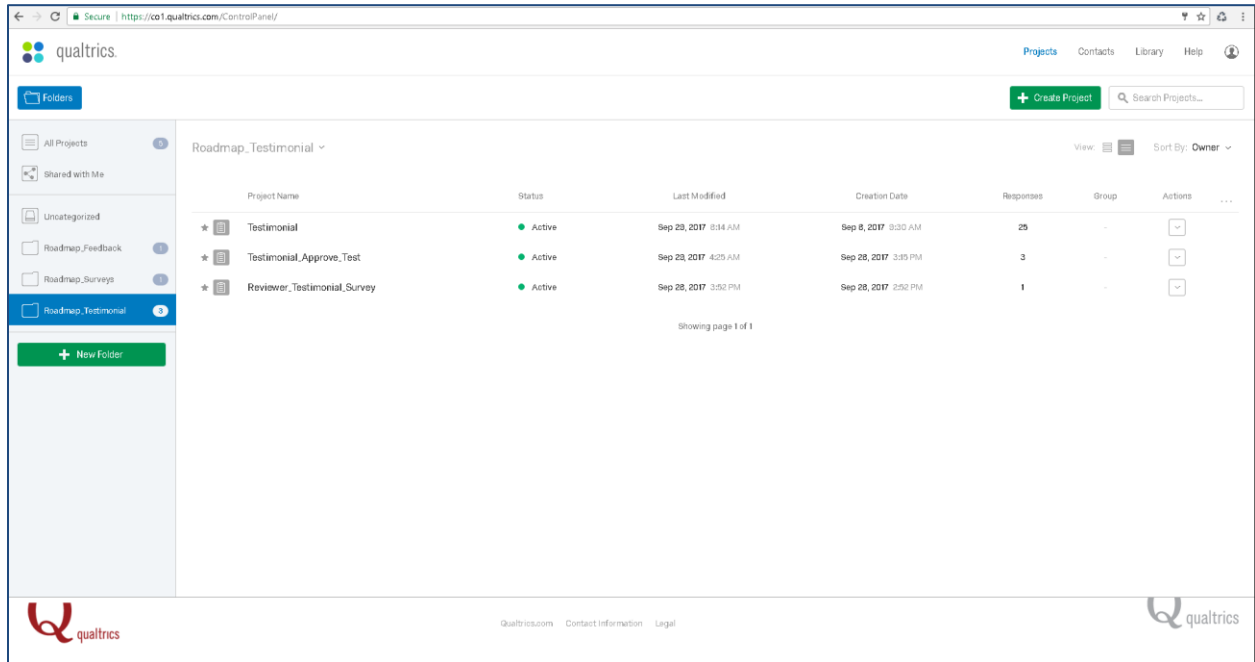
Email

Submit

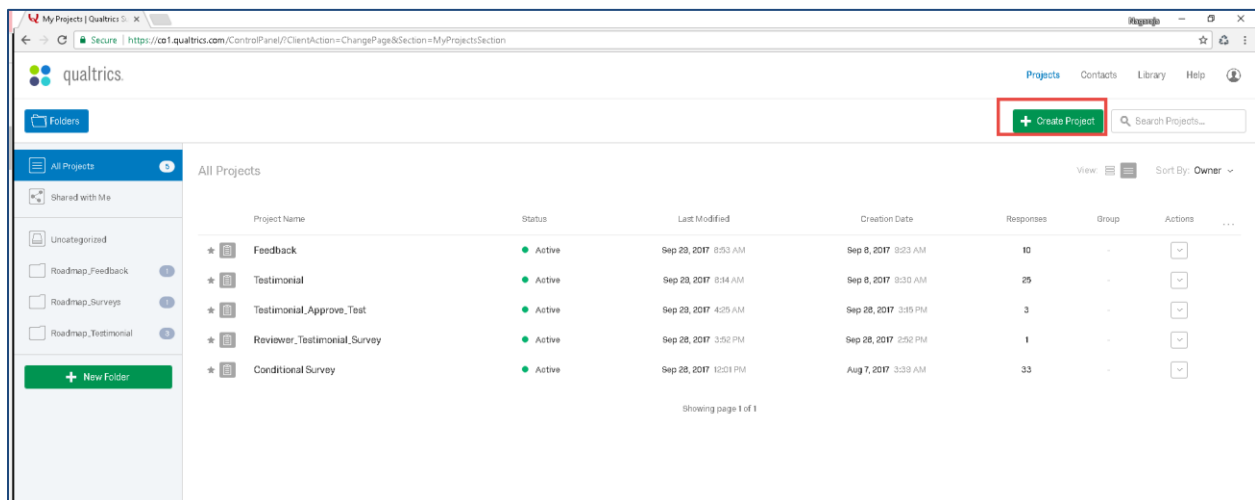
6.2 Qualtrics Survey

6.2.1.1 Create Survey

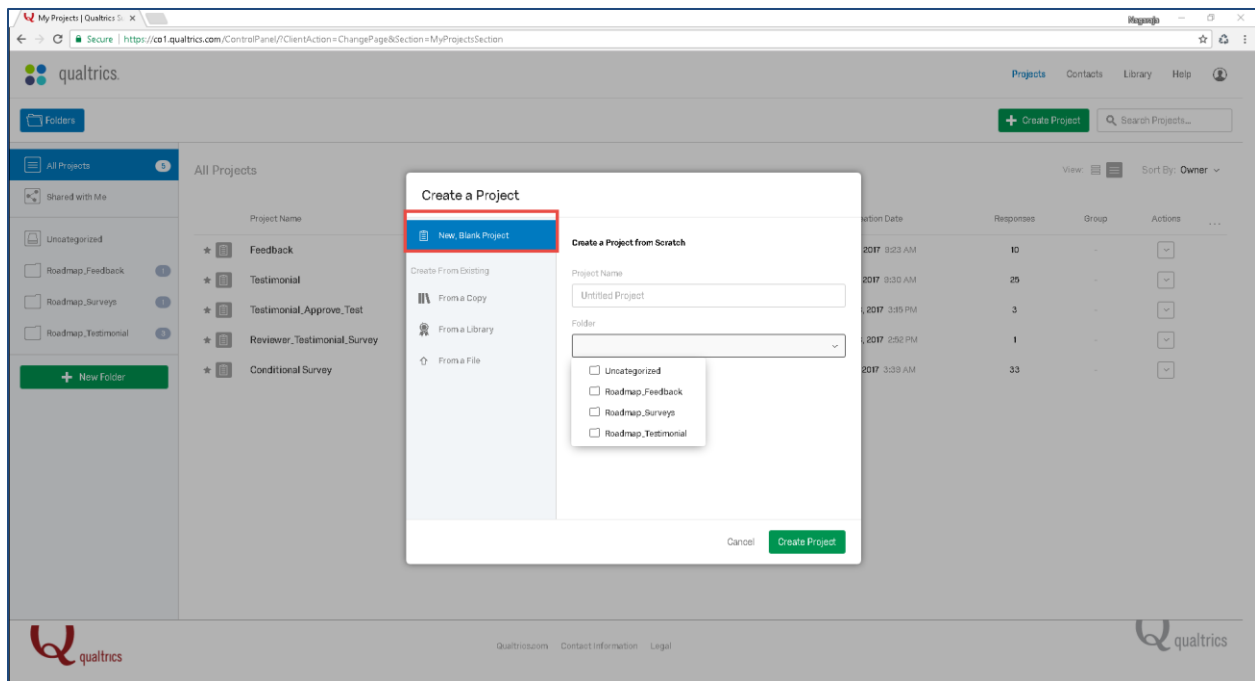
1. Login to <https://www.qualtrics.com> website



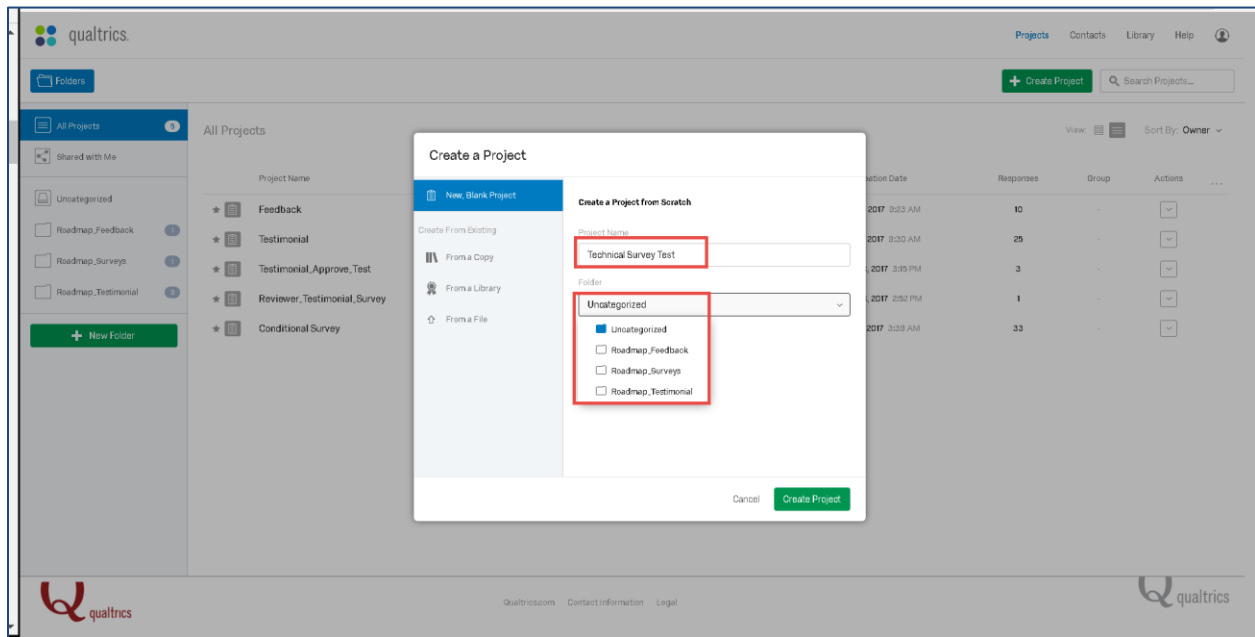
2. Click on Create Project.



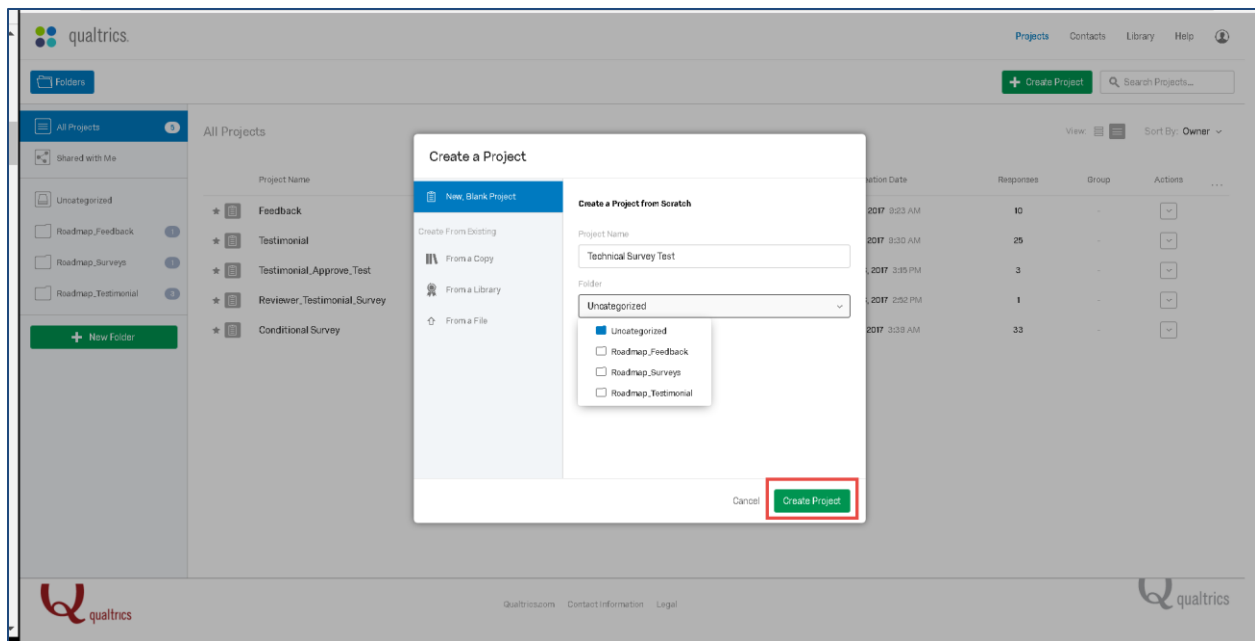
3. Choose New, Blank Project (New Survey)



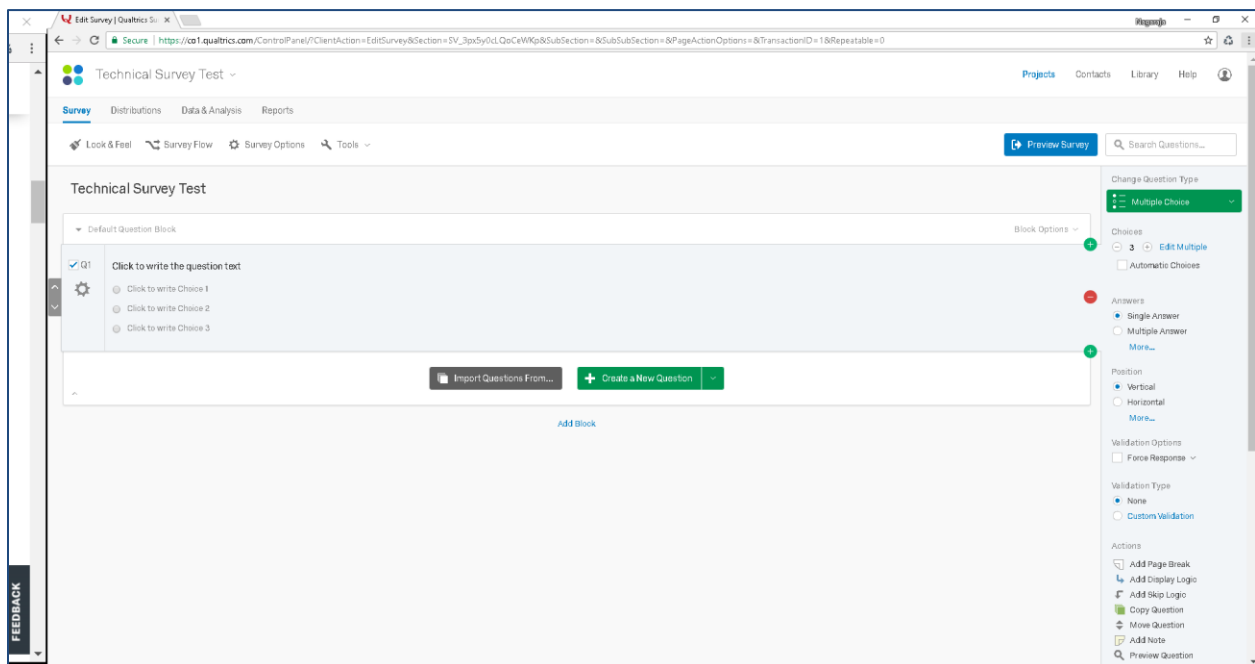
4. Name your survey and choose a folder to save it in.



5. Click Create Project to finish.



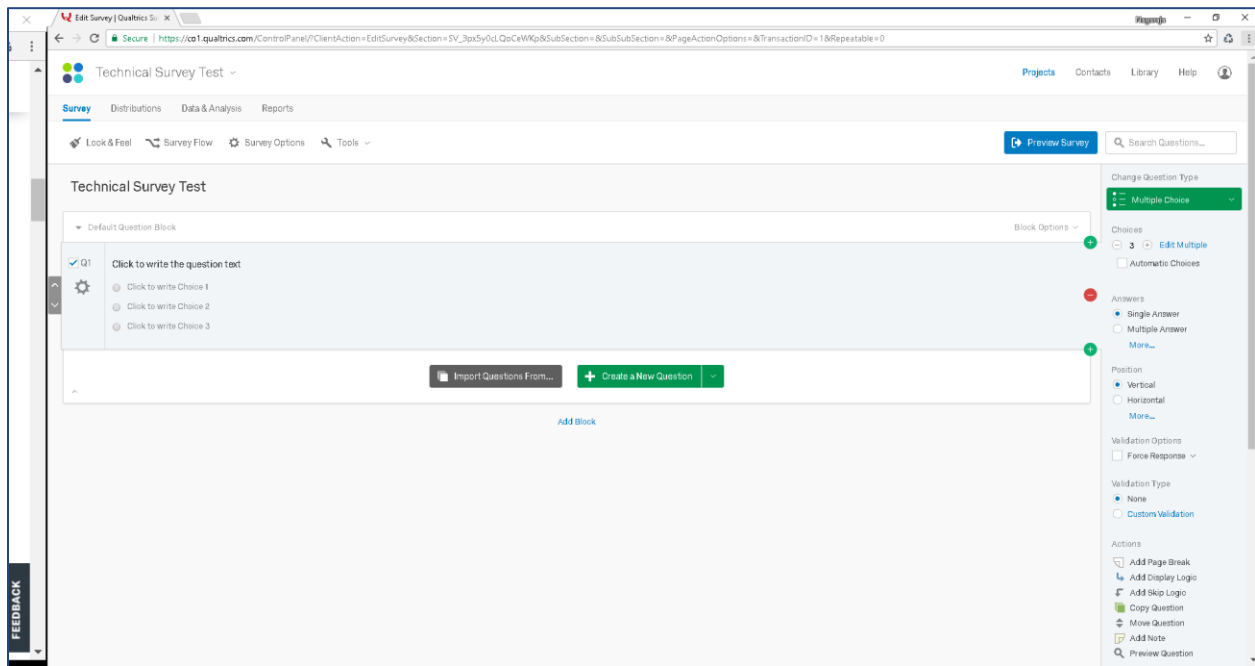
6. After clicking Create Project, you'll be taken to the Survey tab where you can begin adding questions to your survey.



6.2.1.2 Editing Survey

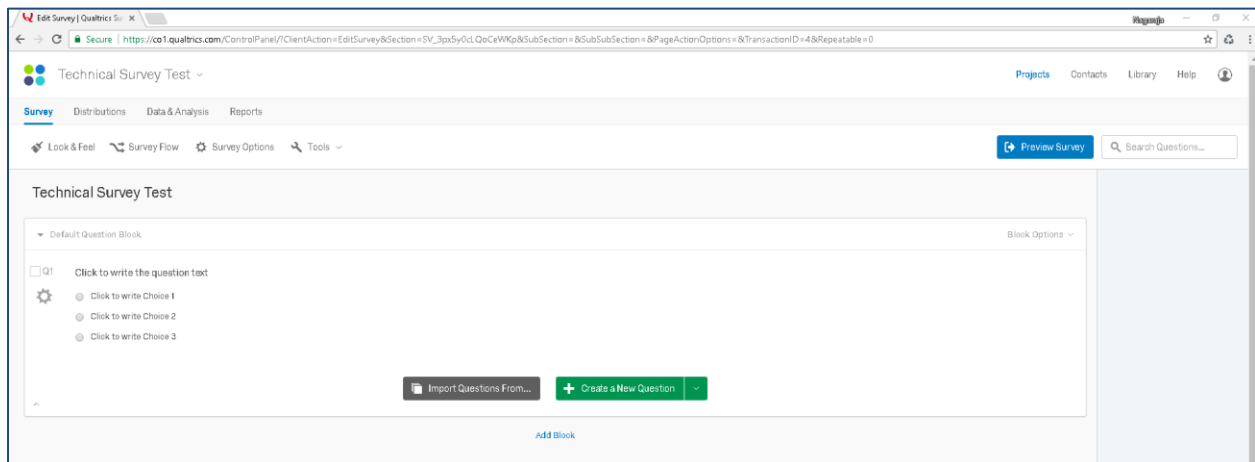
The Survey tab is where you build and edit the survey piece of your project. From here, you'll create questions, add logic and validation, design the look, and more. This page outlines the major areas in the Survey tab and points out some of the more commonly used features.

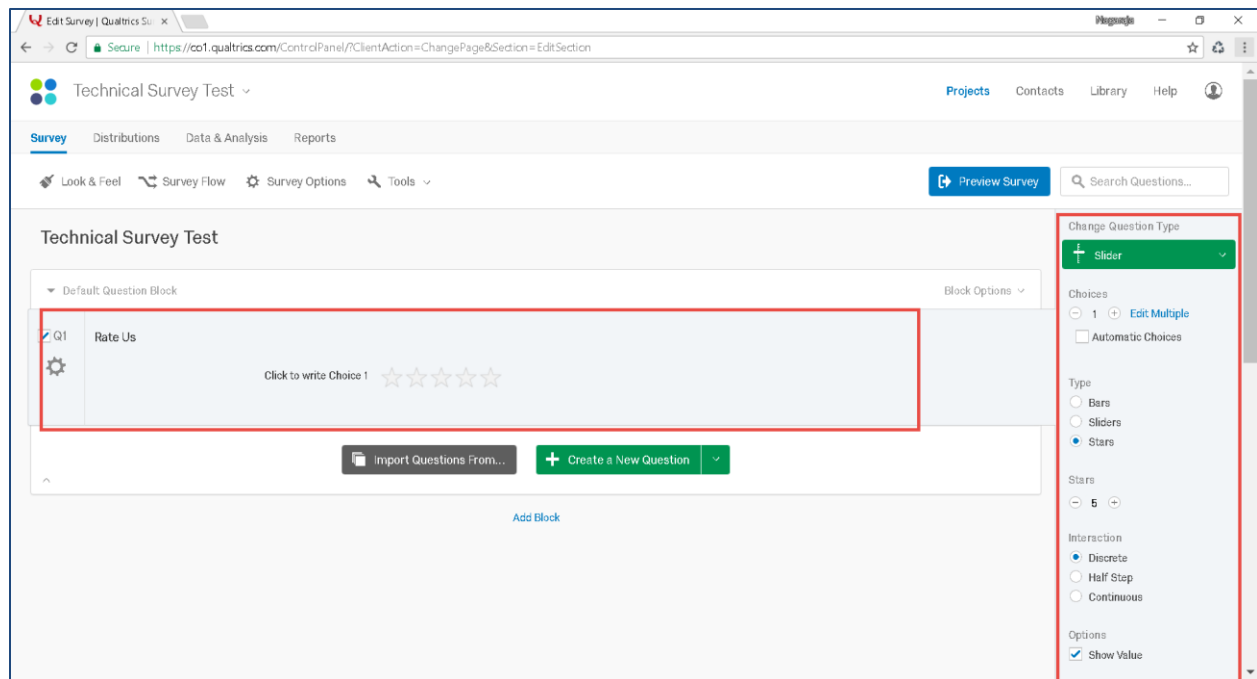
1. Select and Edit newly created survey



2. By default system creates sample question edit this question as desired.

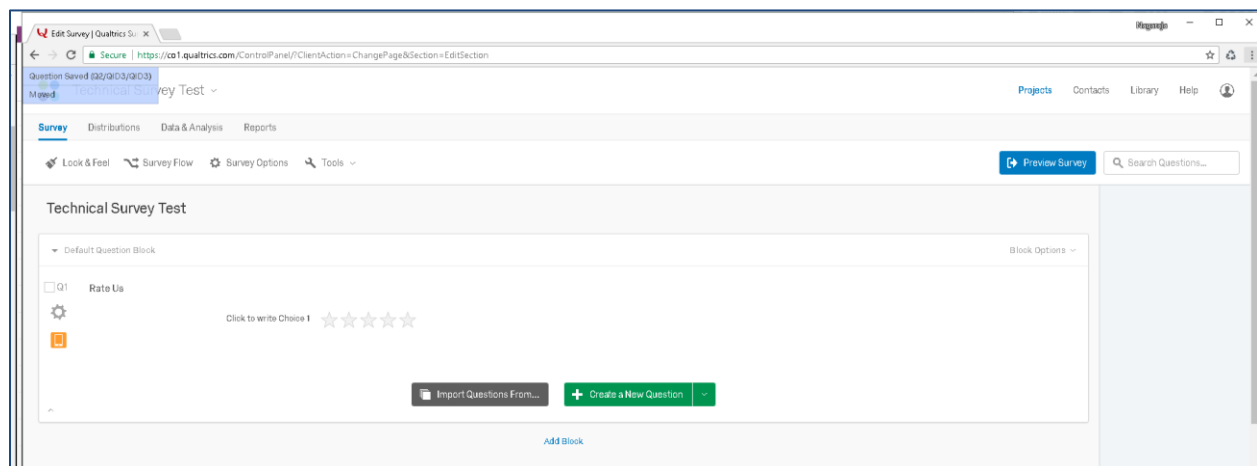
*Note: Questions are numbered in the order they are created, not the order they appear in the survey. You can renumber your questions by using the [Auto-Number Questions](#) feature.



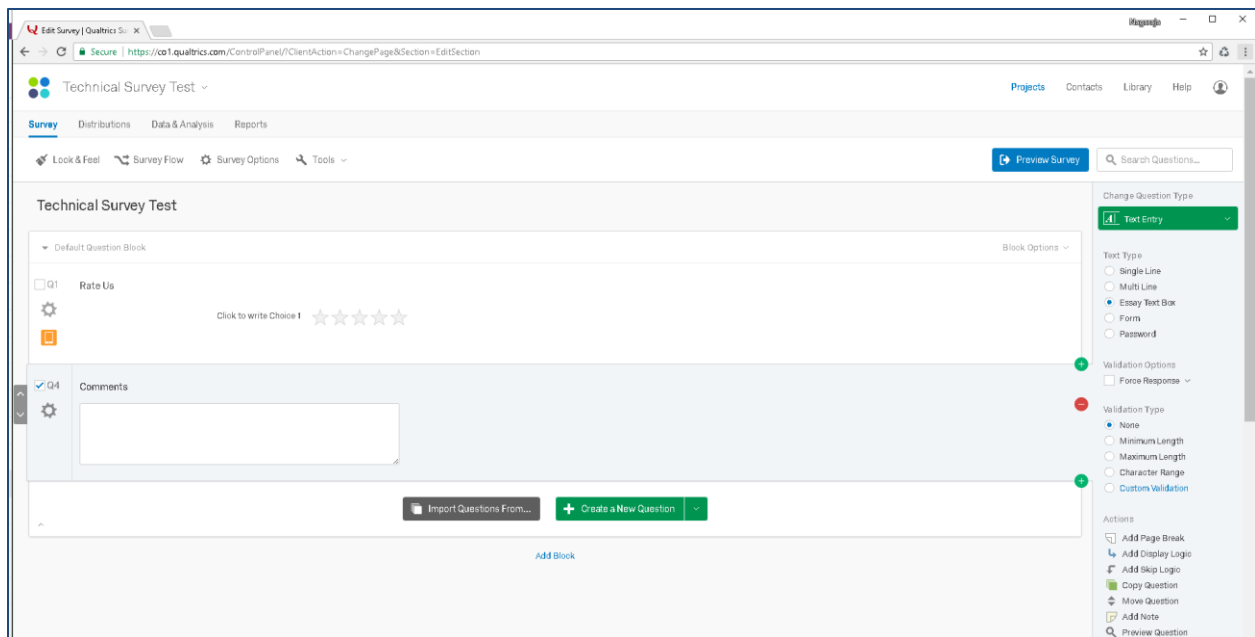


3. If desired, change the [question type](#) by clicking the green dropdown labeled Change Question Type and then select your desired question type.

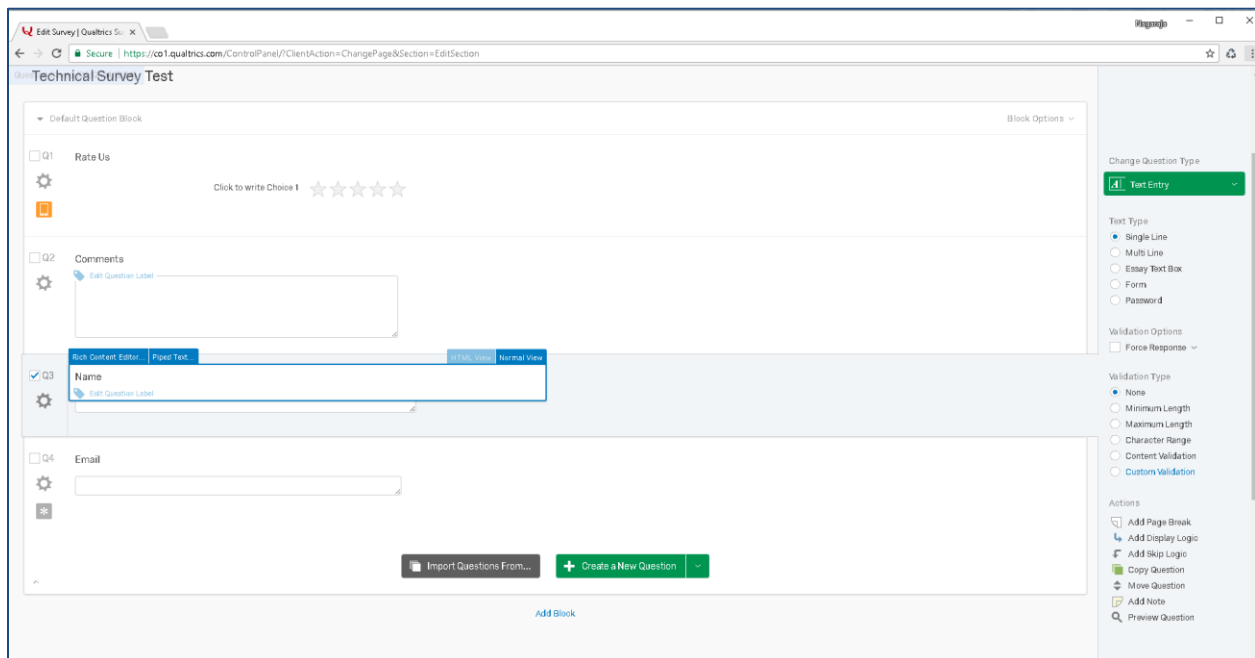
4. Click Create a New Question.



5. Update the question and choices as desired in this case its text box for comments



6. Add Name question to survey

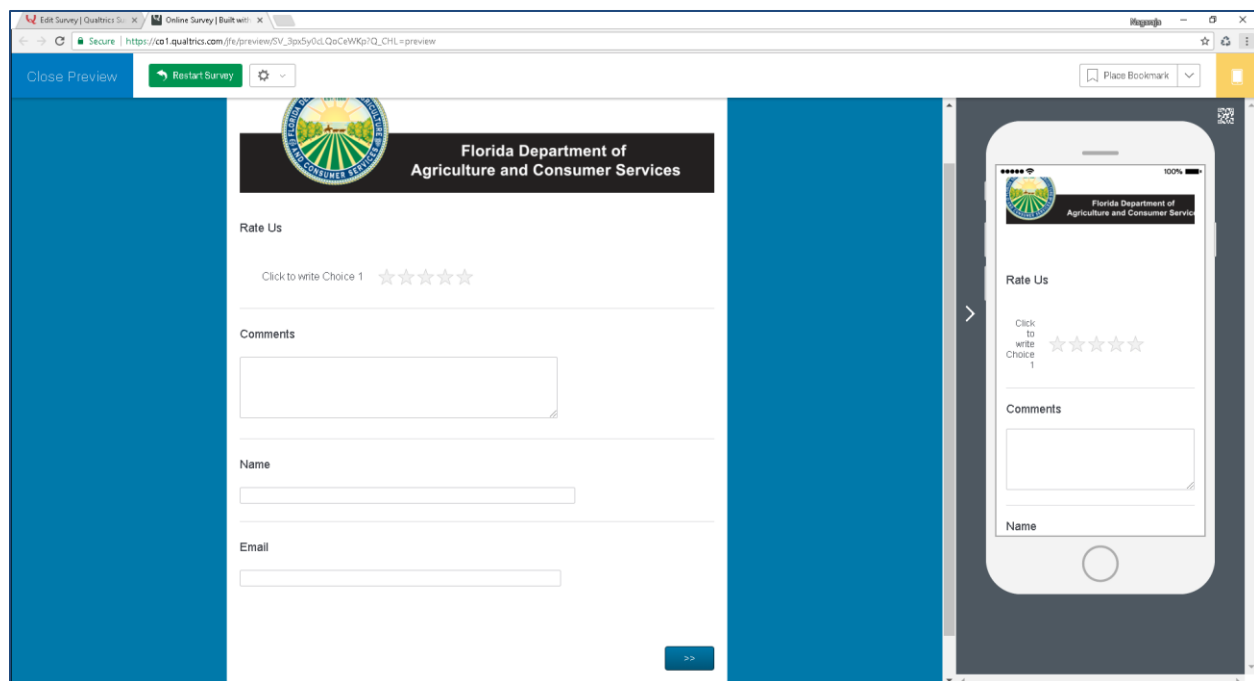


7. Add Email question to survey

The screenshot shows the Qualtrics 'Edit Survey' interface for a survey titled 'Technical Survey Test'. The survey is in the 'Survey' tab, and the 'Default Question Block' is selected. The survey contains three questions: Q1 'Rate Us' (a star rating question), Q2 'Comments' (a text entry question), and Q3 'Email' (a text entry question). The 'Email' question is currently selected. The right-hand sidebar shows the 'Change Question Type' dropdown set to 'Text Entry'. Below this, the 'Text Type' options are 'Single Line' (selected), 'Multi Line', 'Essay Text Box', 'Form', and 'Password'. The 'Validation Options' section includes 'Force Response' (unchecked), 'Validation Type' (None, Minimum Length, Maximum Length, Character Range, Content Validation, Custom Validation), and 'Content Type' (Email Address, US Phone Number, US State, US Postal Code, Date (mm/dd/yyyy), Number, Text Only (Non-numeric)). At the bottom of the survey editor, there are buttons for 'Import Questions From...', '+ Create a New Question', and 'Add Block'.

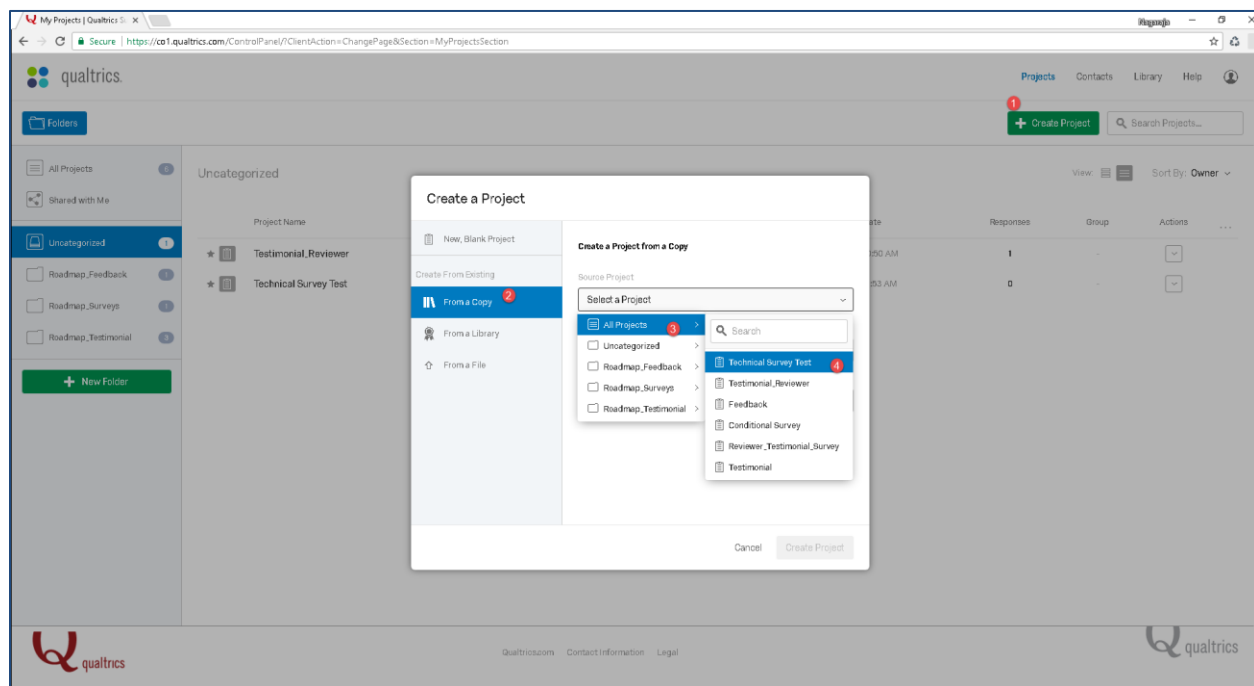
8. Click on Preview Survey to preview the created survey

This screenshot is identical to the one above, showing the 'Technical Survey Test' survey in the 'Edit Survey' interface. The 'Email' question (Q3) is still selected. The key difference is that the 'Preview Survey' button, located in the top right corner of the survey editor area, is now highlighted with a red rectangular box. This button is labeled 'Preview Survey' and has a magnifying glass icon. The rest of the interface, including the question list and the right-hand configuration sidebar, remains the same.

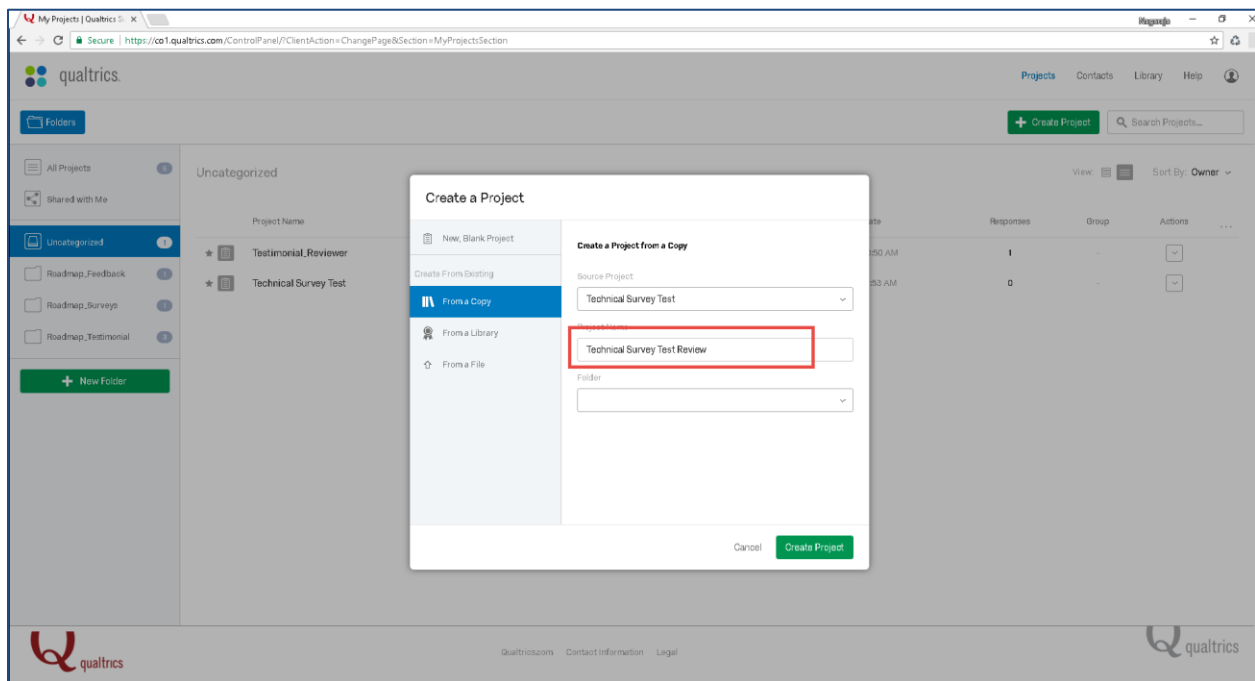
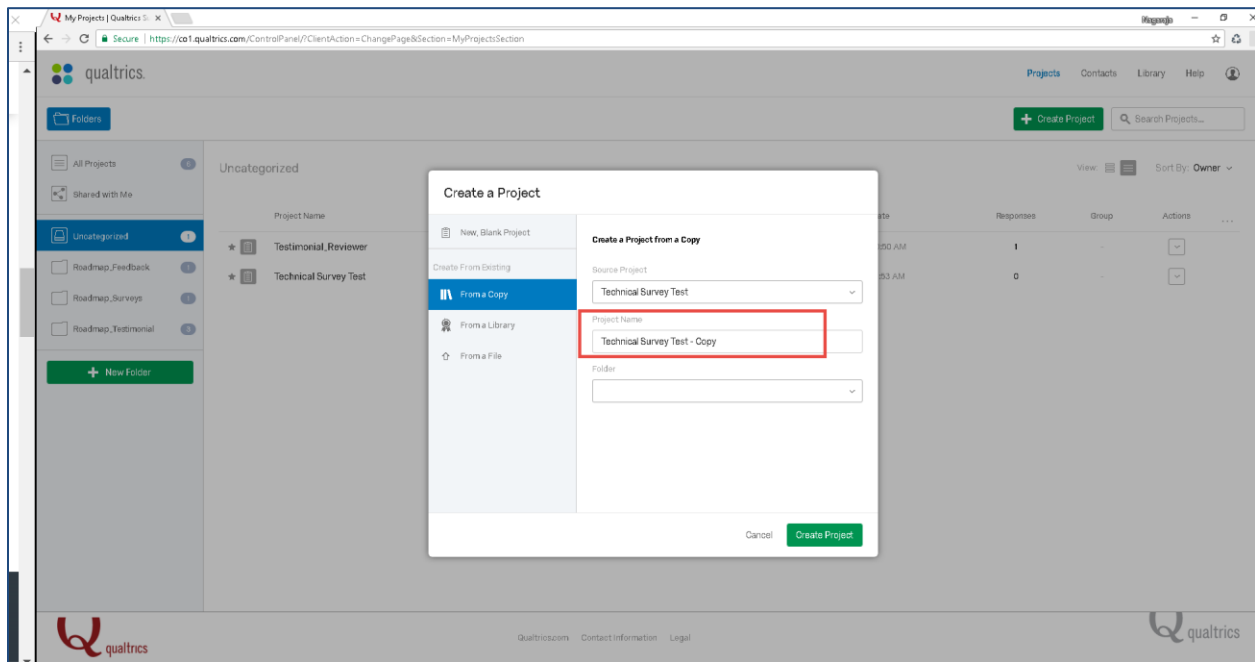


6.2.1.3 Create Copy Survey

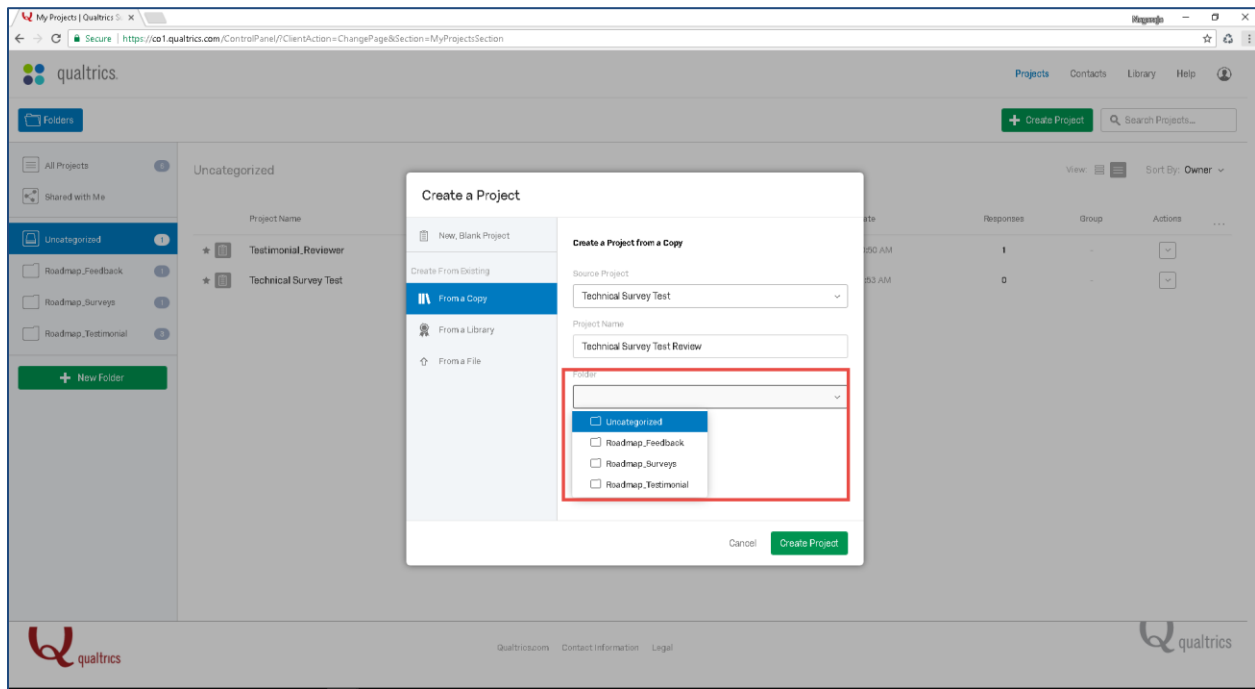
1. Click on Create Project. Under Create From Existing, Select 'From a Copy',
2. Select project Folder and select the desired existing survey



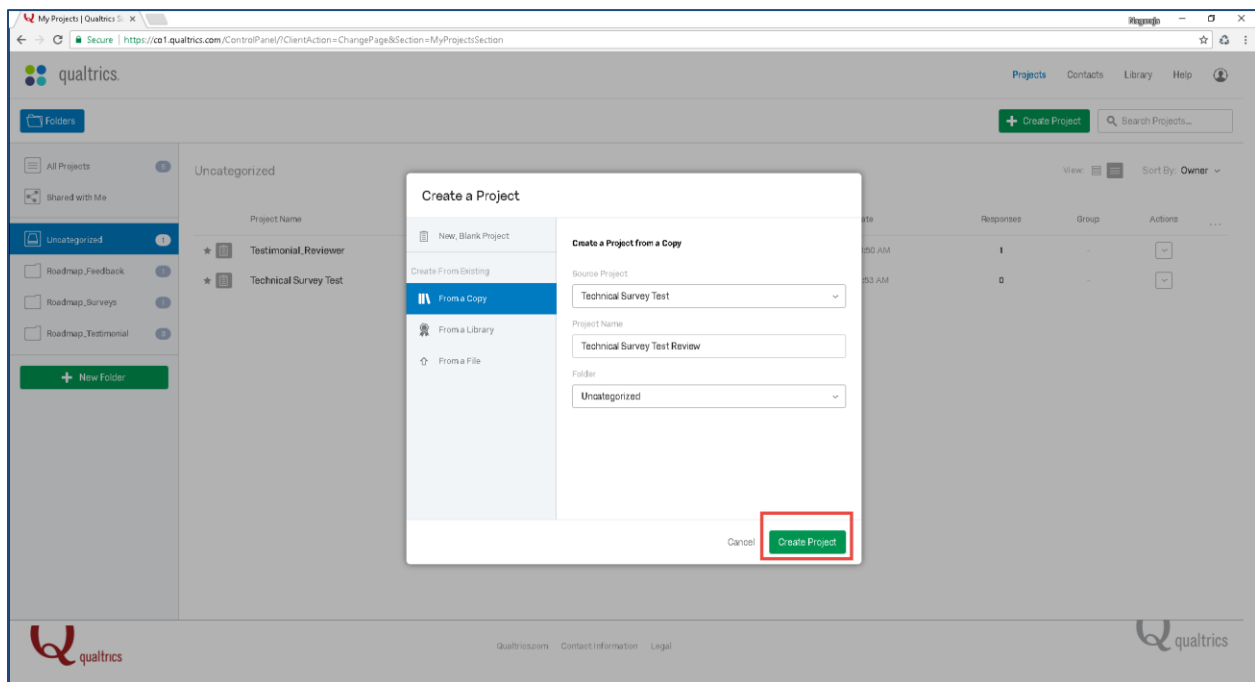
3. Rename the Project/Survey as desired or you can leave the default name



4. Select the desired Folder to organize and save the survey



5. Click on Create Project



6.2.1.4 Embedded Data

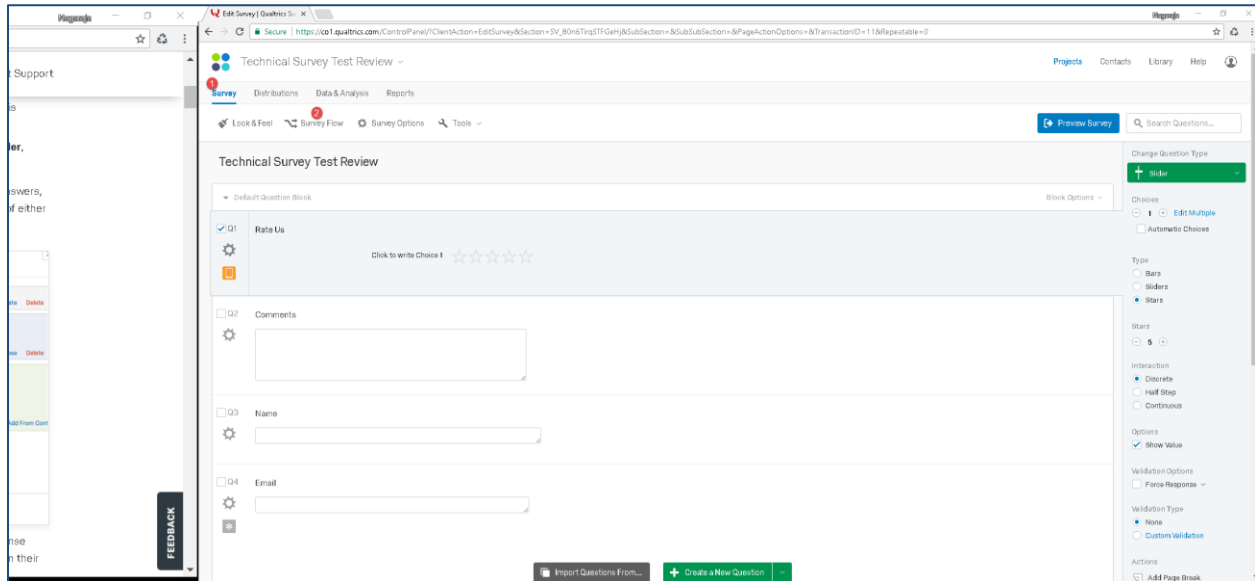
Embedded Data is any extra information you would like recorded in addition to the question responses. It can be used to store information such as

- The social media site a respondent has come from
- The condition a respondent was assigned to in a research study
- Previously gathered information from a contact list so that data will be available for analysis

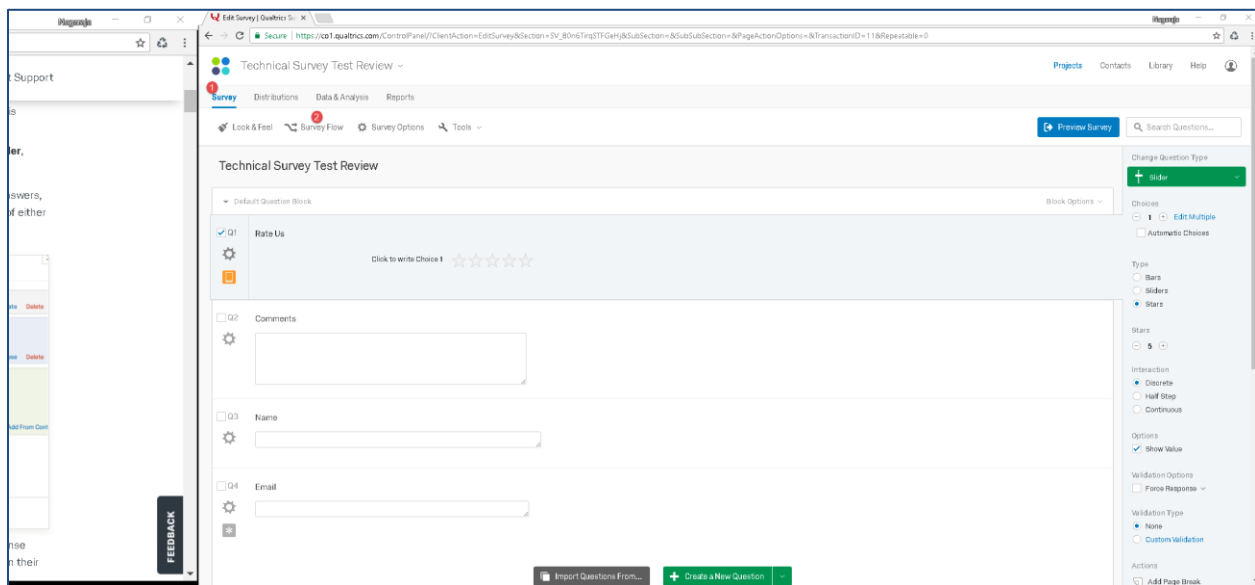
Embedded Data consists of a field and a value. The field is the name of your variable (e.g., **Gender**, **State**, and **Status**).

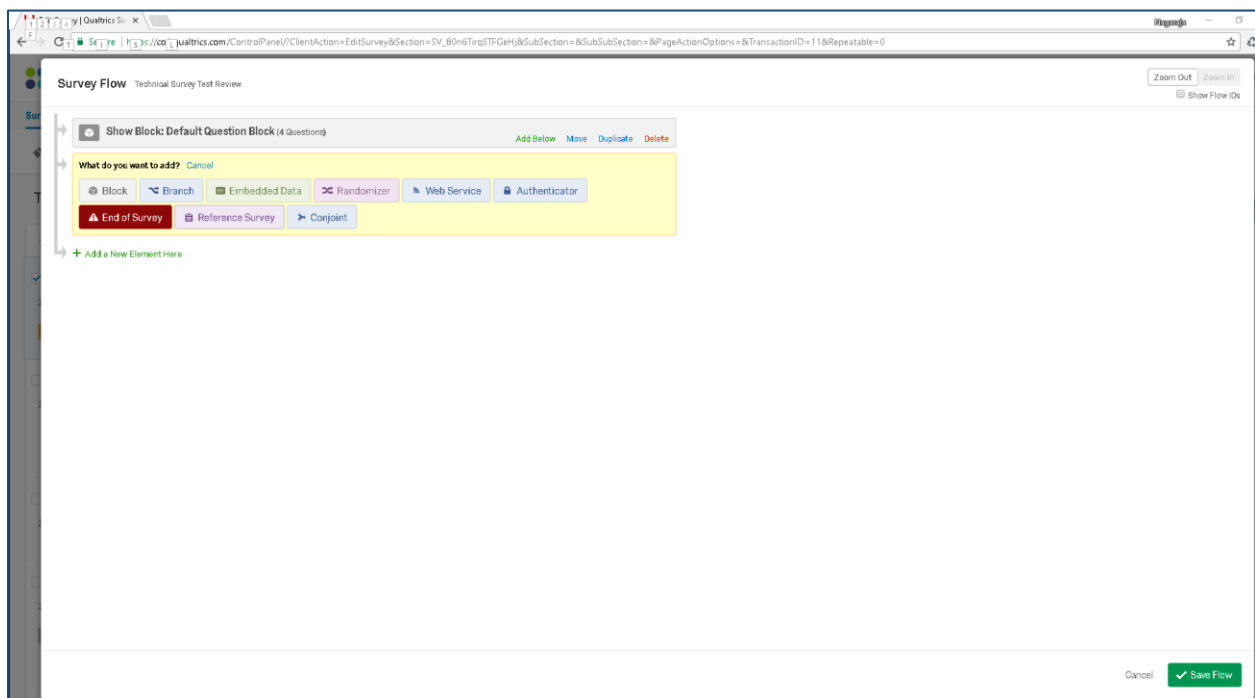
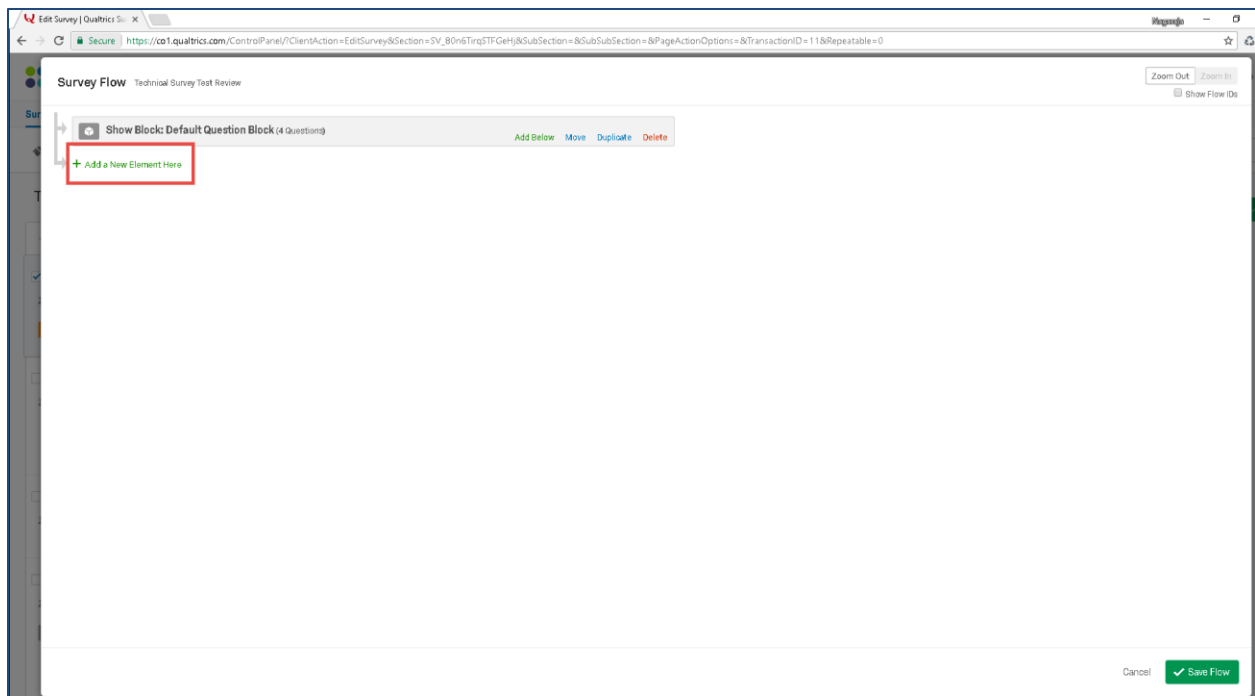
The value is what your field will be set to in your data. Just as one question can have multiple answers, an Embedded Data field can have multiple values (e.g., a field called **Status** might have a value of either **Screened Out**, or **Good Complete**).

1. Edit any Survey, In Survey tab, Click on Survey Flow

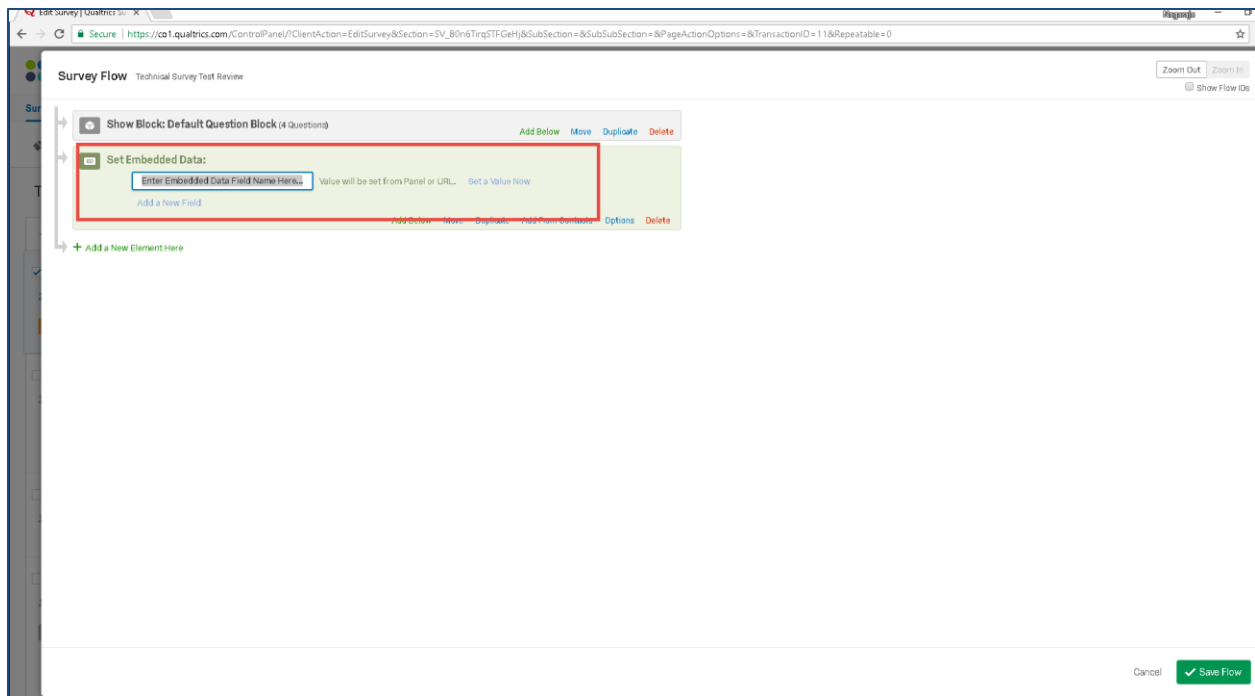


2. Click on Add new element here

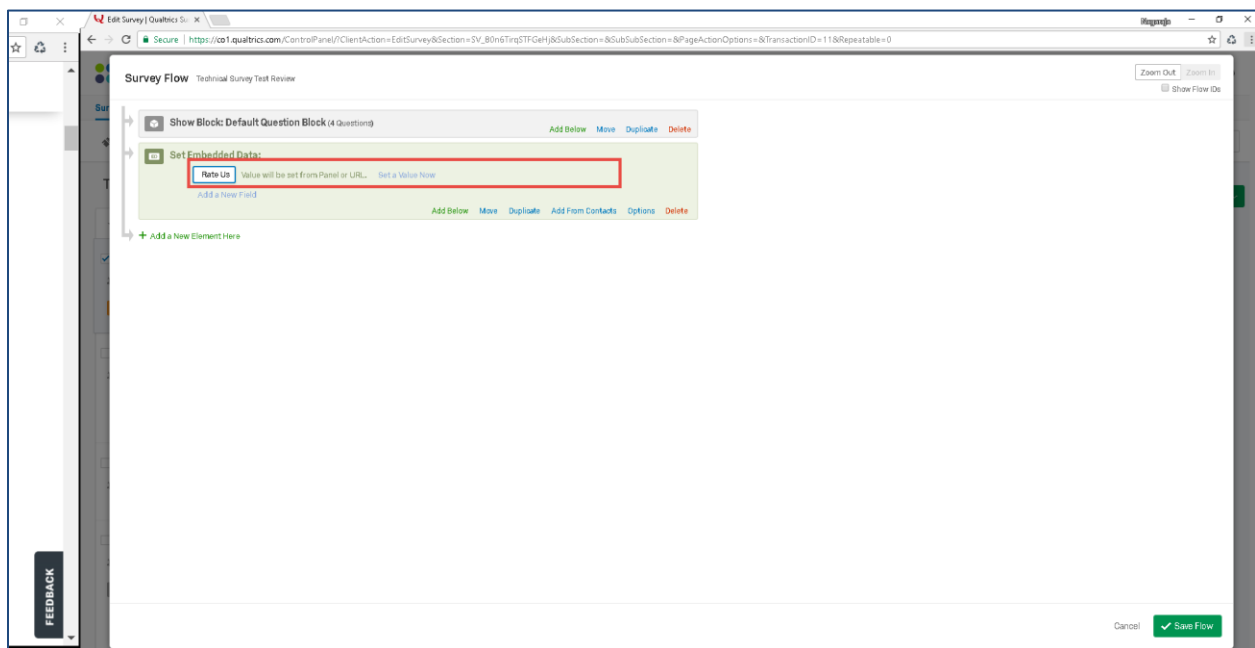




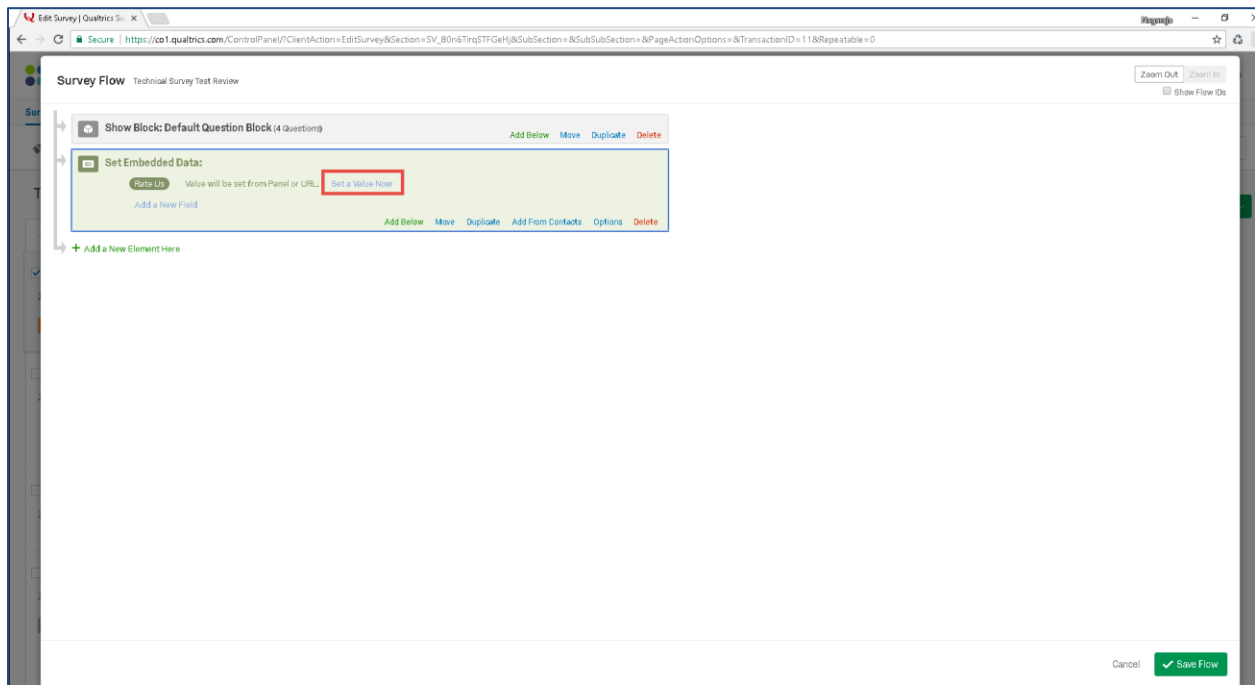
3. Click on Embedded Data button



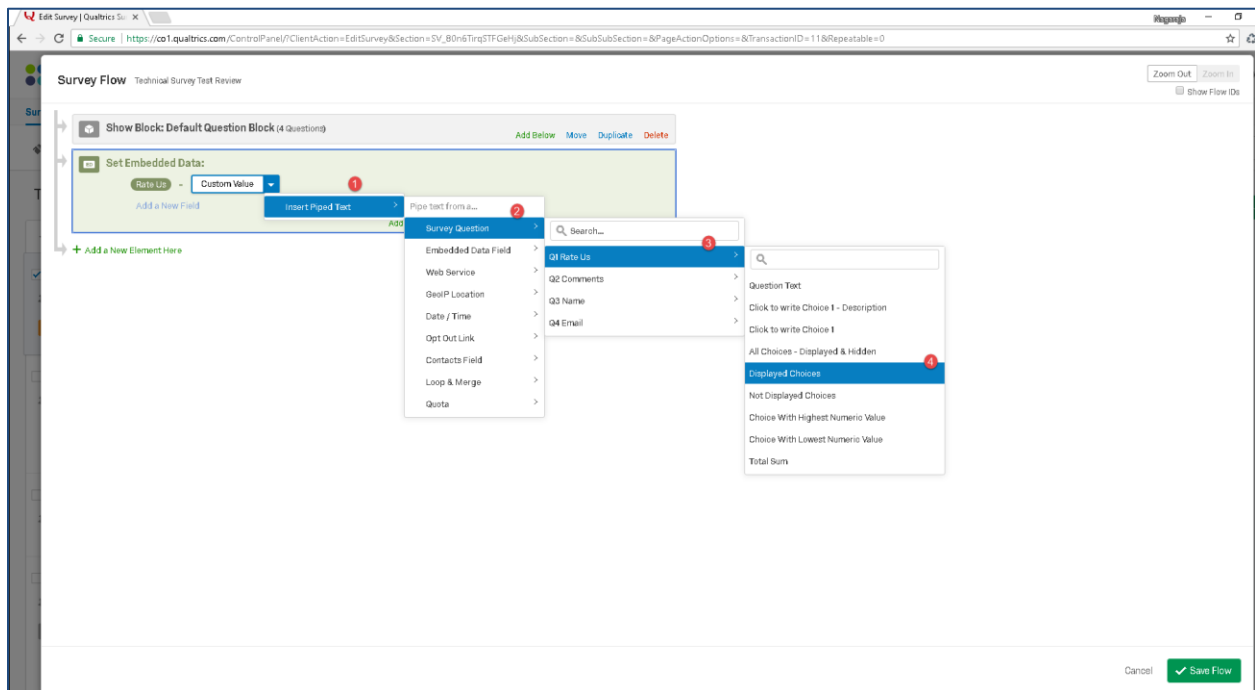
4. Enter Embedded Data Field Name Here...

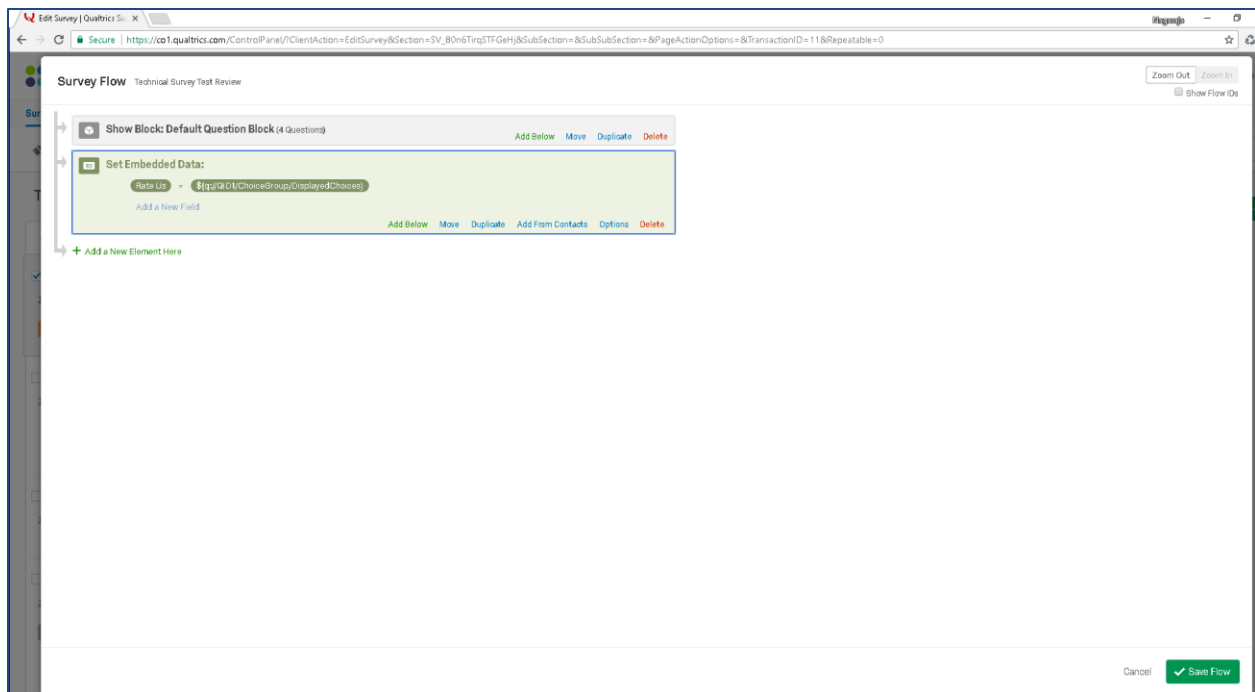


5. Click on Set a value now

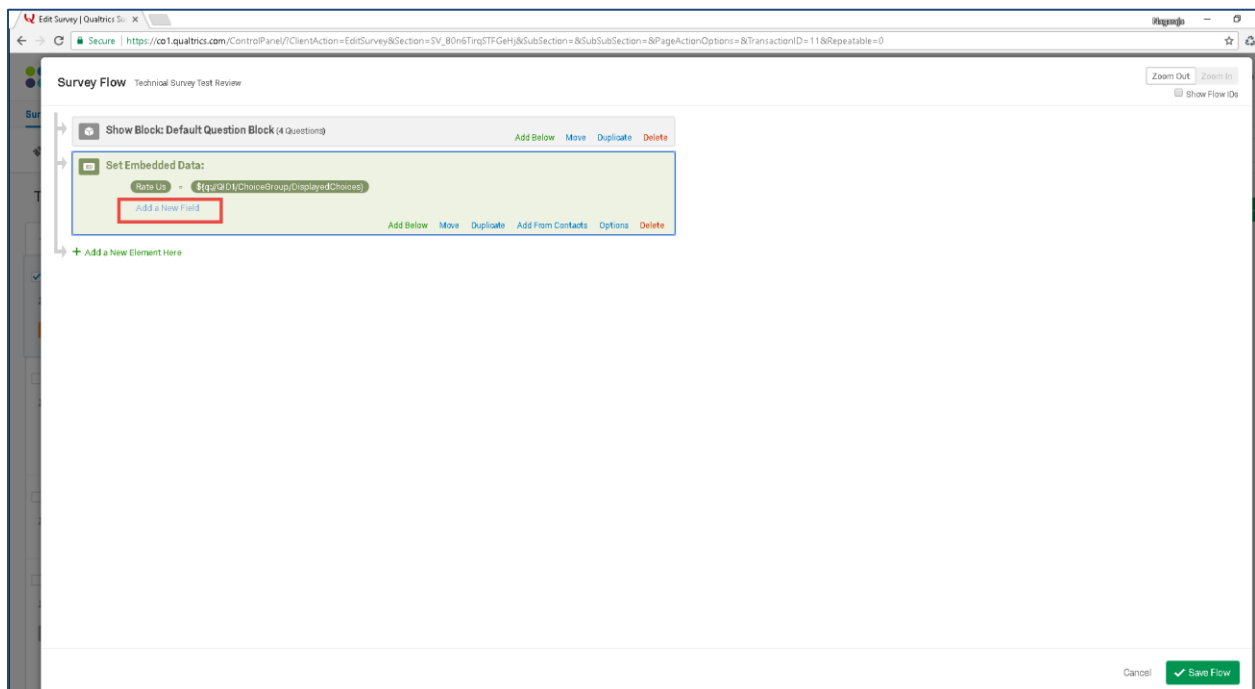


6. Select Insert Piped Text, select Survey question, Select Rate Us, and Select Displayed Choices

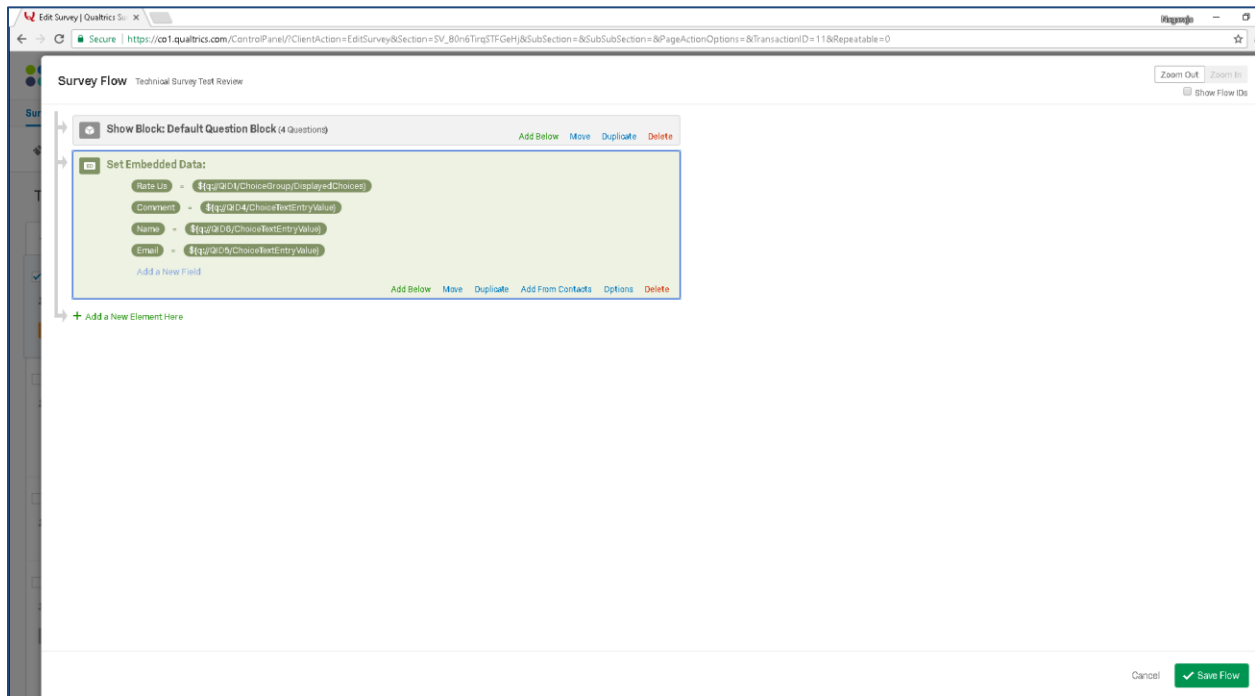




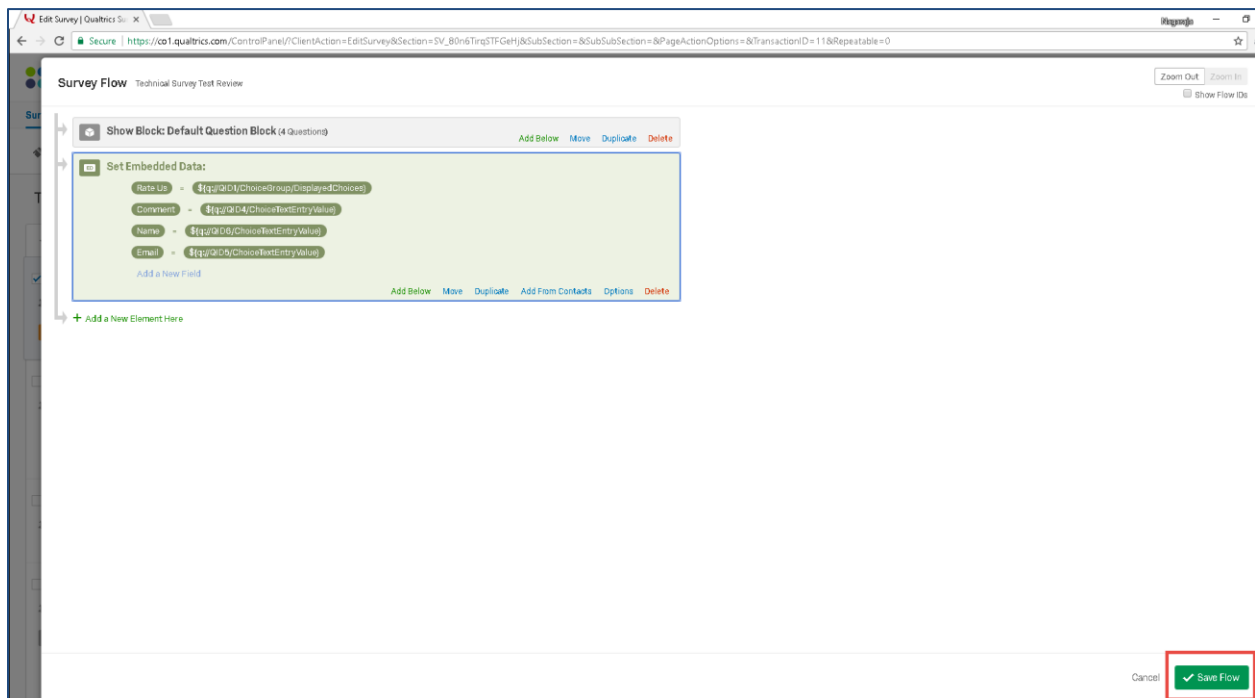
7. Add new filed



8. Add a New Field to set more Embedded Data fields



9. Click on Save Flow

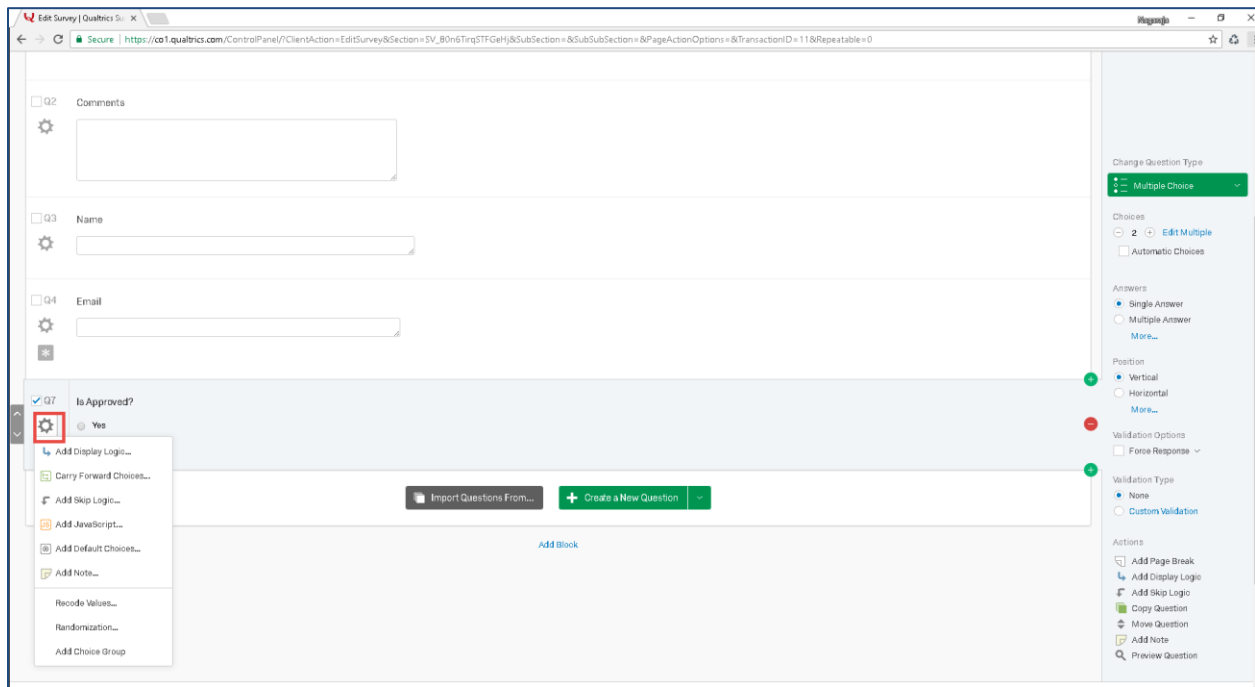


10. Create a new Question, Is Approved? Make settings to display this question to only to Reviewers not to users.

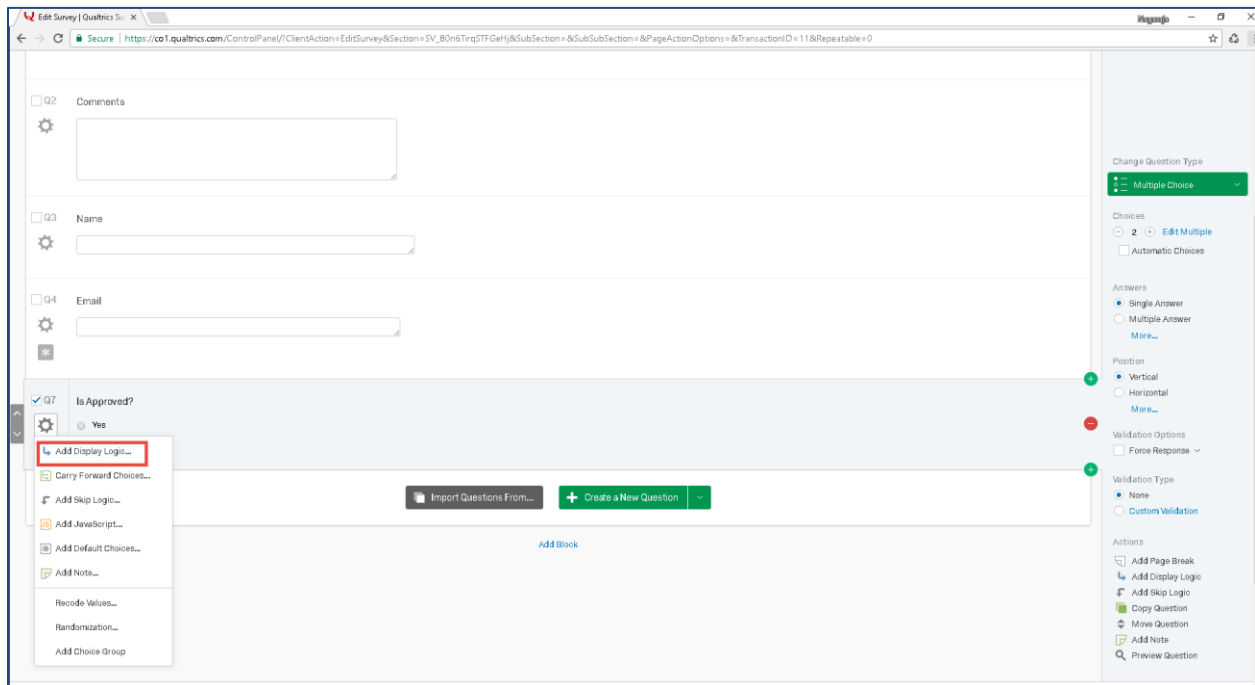
The screenshot shows the Qualtrics 'Edit Survey' interface for a survey titled 'Technical Survey Test Review'. The interface includes a top navigation bar with 'Projects', 'Contacts', 'Library', and 'Help'. Below this is a 'Survey' tab with sub-tabs for 'Distributions', 'Data & Analysis', and 'Reports'. A 'Look & Feel' section is visible on the left. The main content area shows a list of questions: Q1 'Rate Us' (with a star rating), Q2 'Comments' (with a text box), Q3 'Name' (with a text box), and Q4 'Email' (with a text box). At the bottom of the question list, there is a red box highlighting the '+ Create a New Question' button. The URL in the browser address bar is https://co1.qualtrics.com/ControlPanel/ClientAction=EditSurvey&Section=SV_80n6TiqSTFGehj&SubSection=&SubSubSection=&PageActionOptions=&TransactionID=11&Repeatable=0.

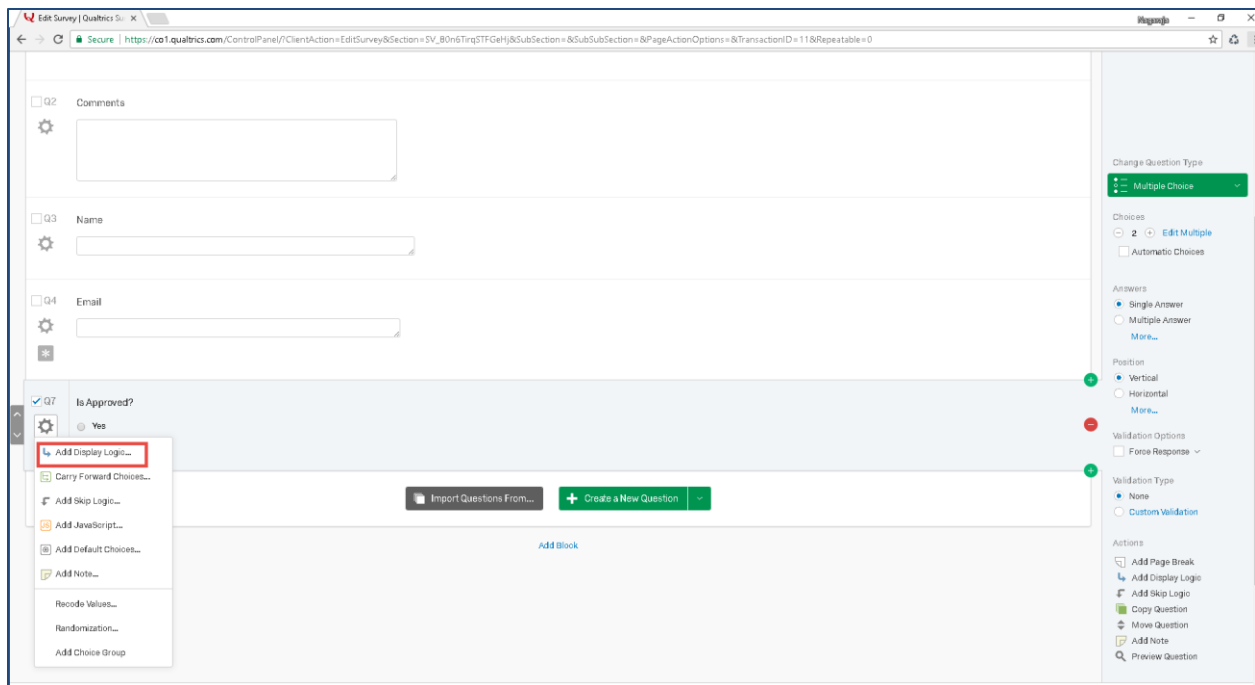
The screenshot shows the Qualtrics 'Edit Survey' interface for the same survey. The question list now includes Q7 'Is Approved?' (with radio buttons for 'Yes' and 'No'), which is highlighted with a red box. The 'Change Question Type' panel on the right is also highlighted with a red box. This panel shows the 'Multiple Choice' question type selected, with options for 'Choices' (2), 'Answers' (Single Answer, Multiple Answer), 'Position' (Vertical, Horizontal), 'Validation Options' (Force Response), and 'Validation Type' (None, Custom Validation). The 'Add Block' button is visible at the bottom of the question list. The URL in the browser address bar is https://co1.qualtrics.com/ControlPanel/ClientAction=EditSurvey&Section=SV_80n6TiqSTFGehj&SubSection=&SubSubSection=&PageActionOptions=&TransactionID=11&Repeatable=0.

11. Add display logic by clicking on Settings button beside the question 'Is Approved?'

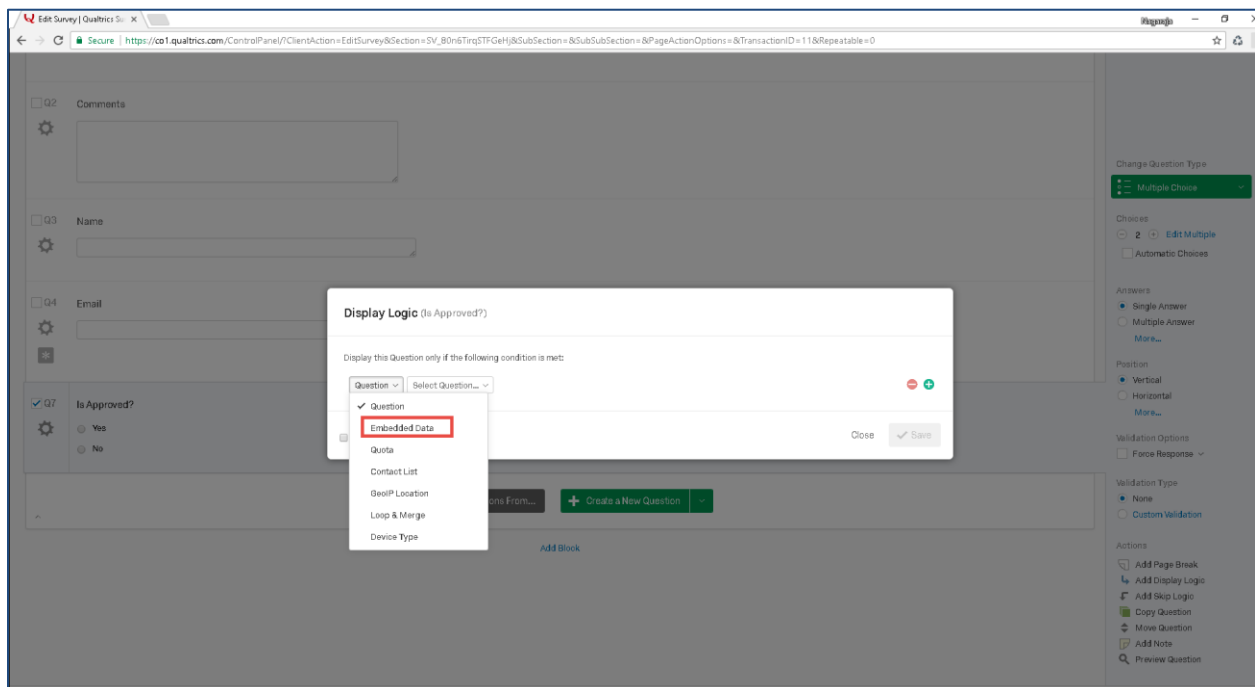


12. Select Add Display Logic





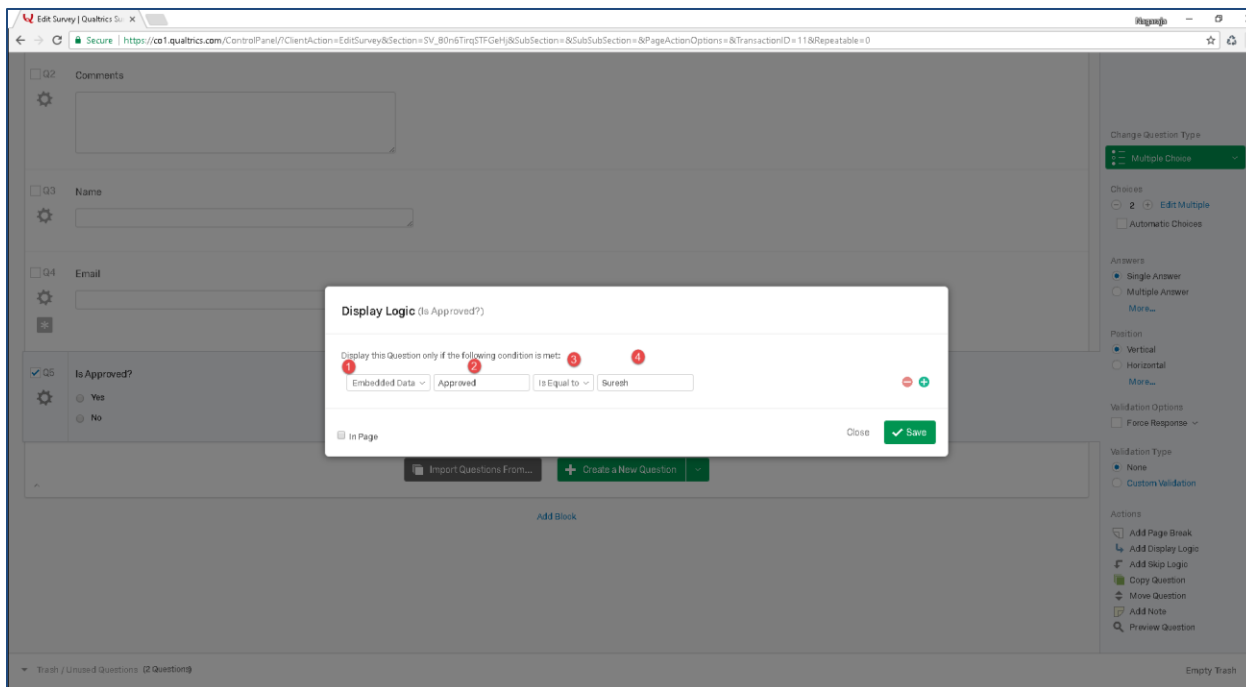
13. On display logic popup, for Question, Select Embedded Data



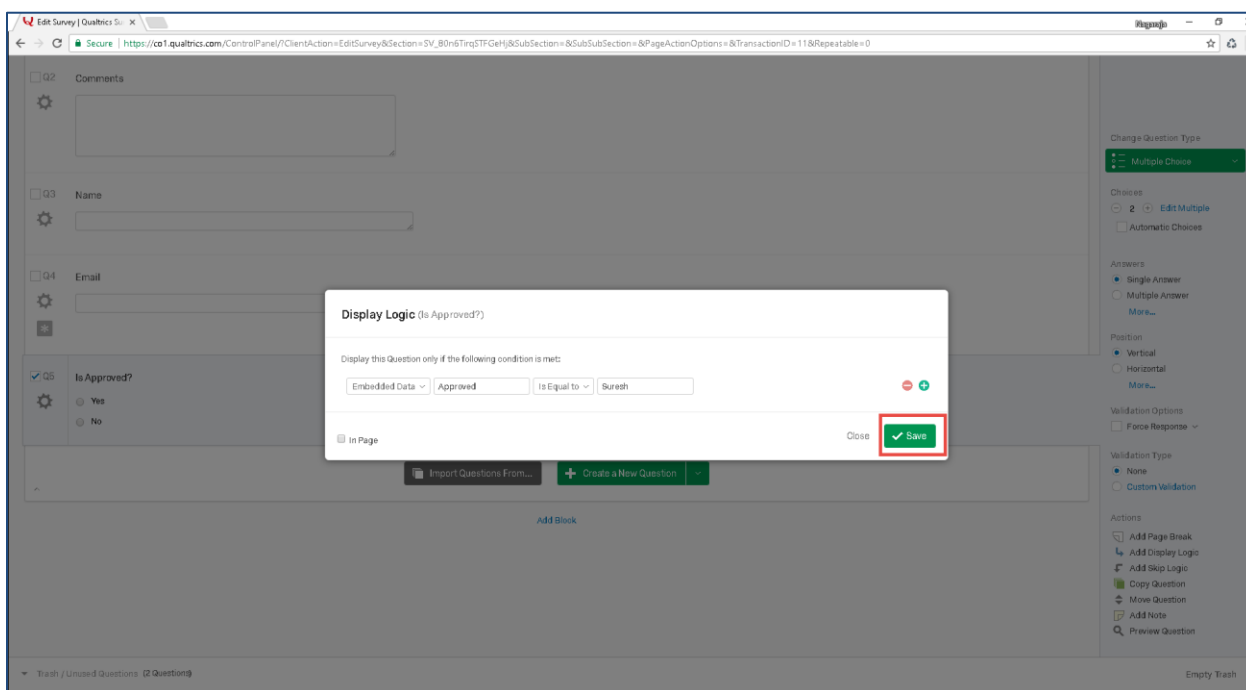
14. Input the condition for Embedded Data i.e. in this case 'Approved'.

15. Set desired condition , in this case 'Is Equal to'

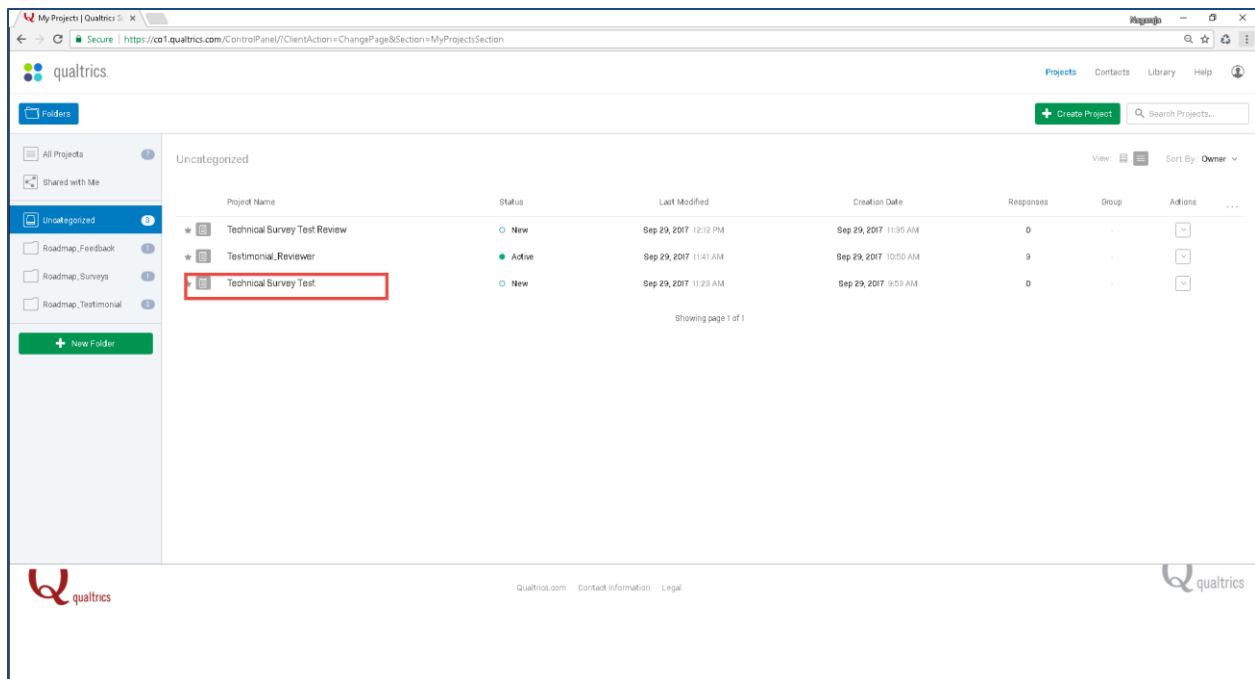
16. Set the condition value for the Embedded Data



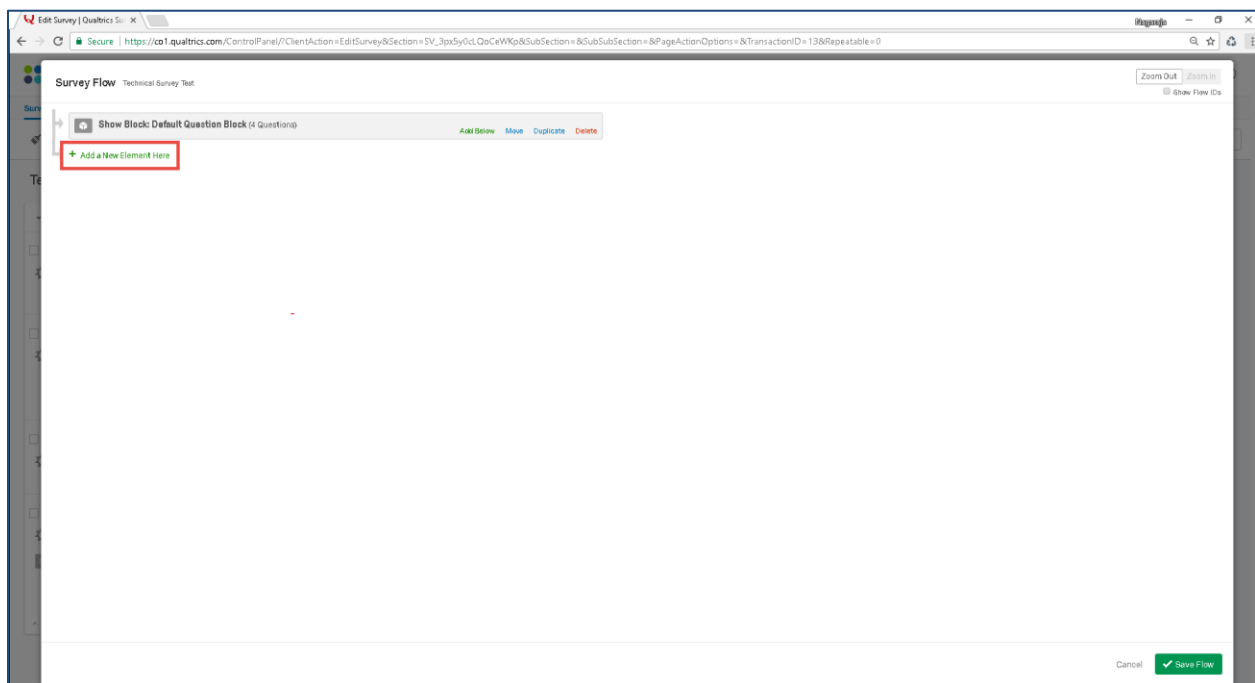
17. Click on Save button



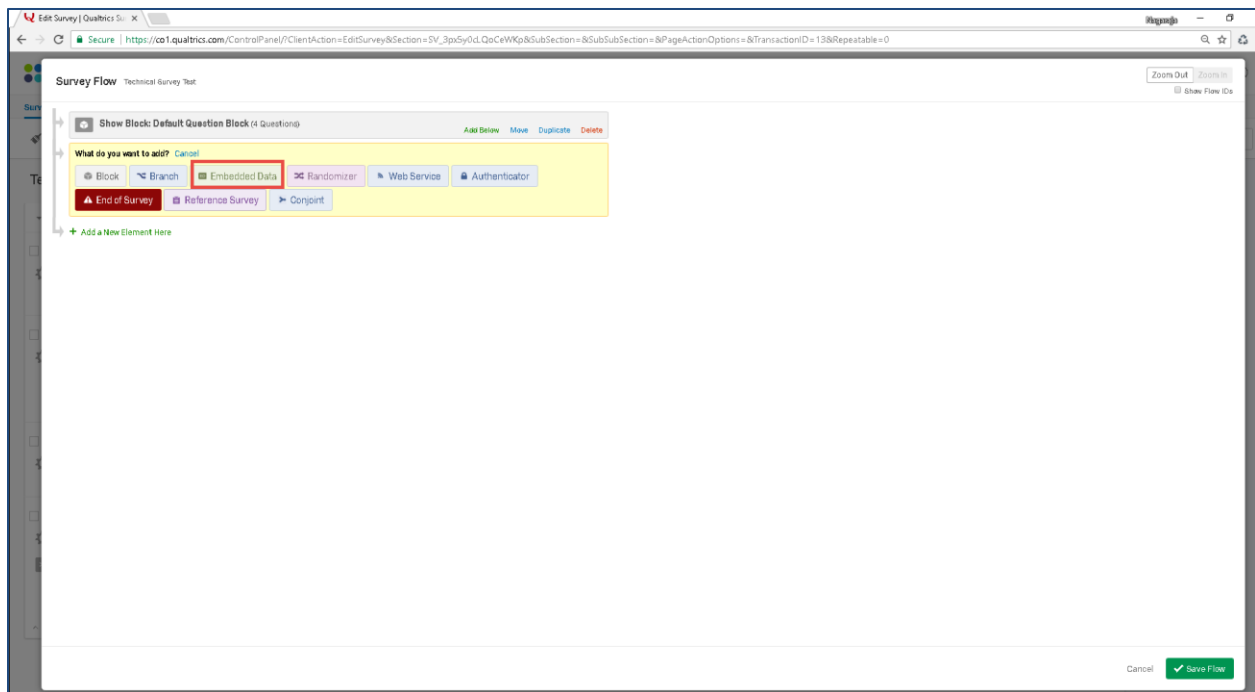
18. Edit the Technical Survey Test (this is survey for users).



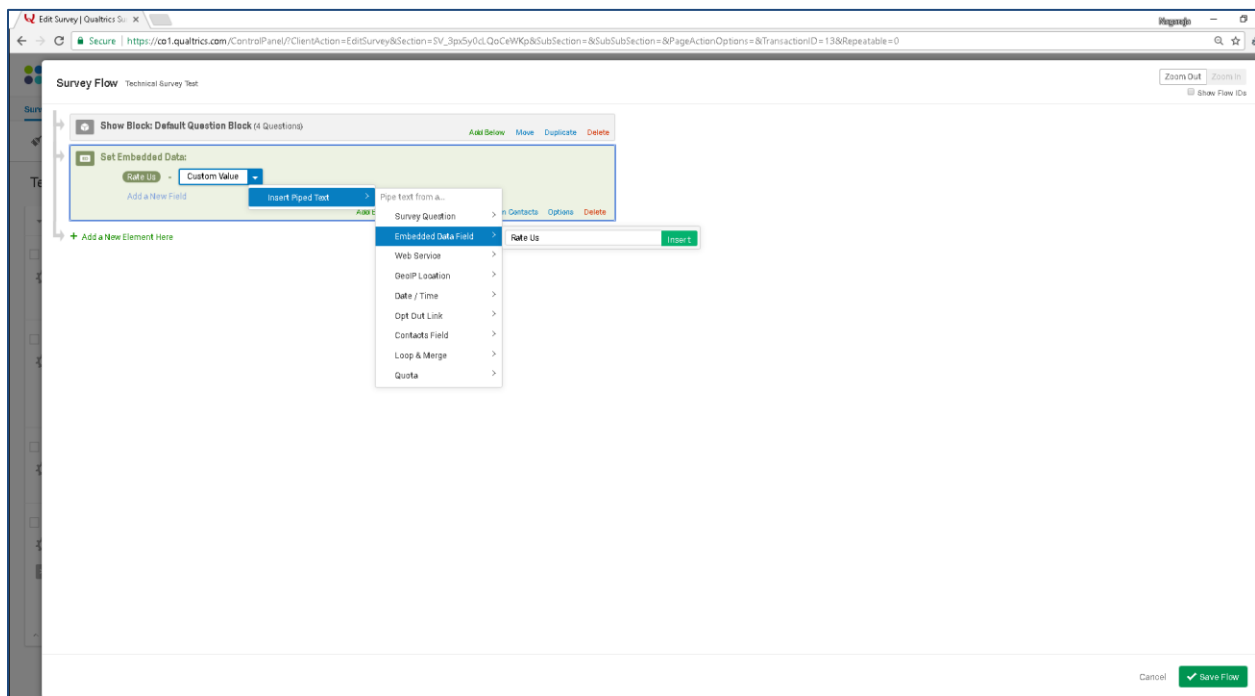
19. At Survey tab, Survey Flow. Click Add a new Element Here

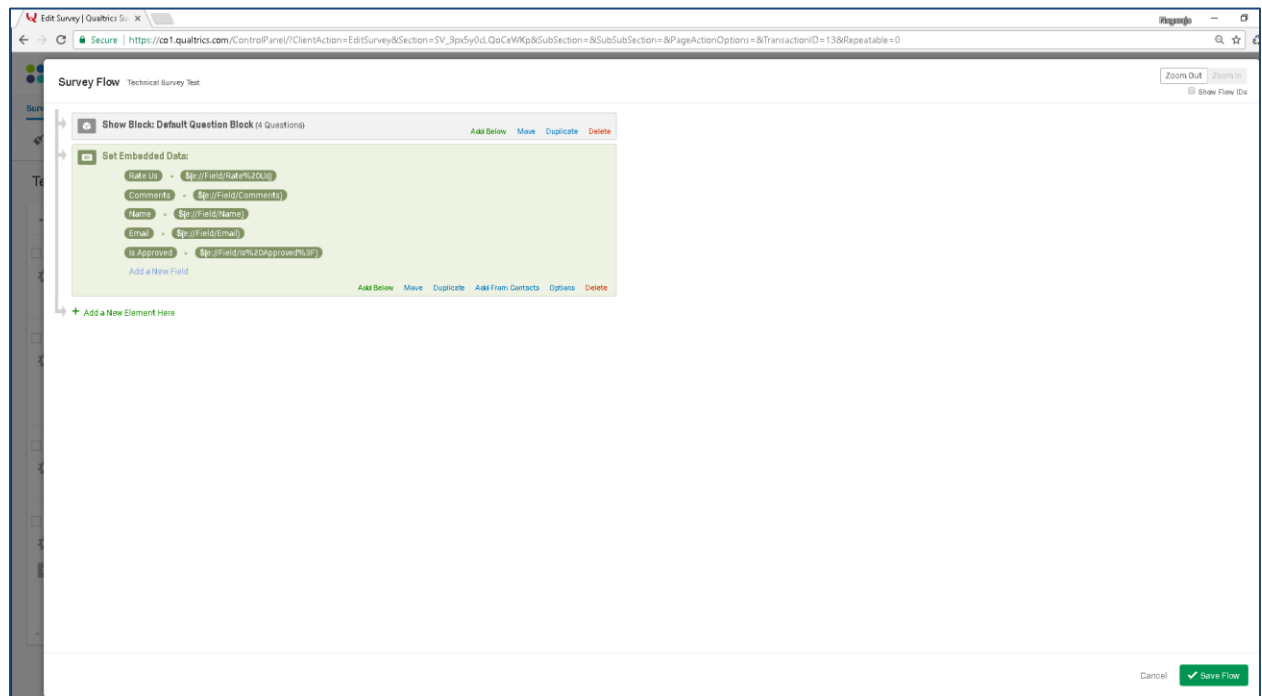
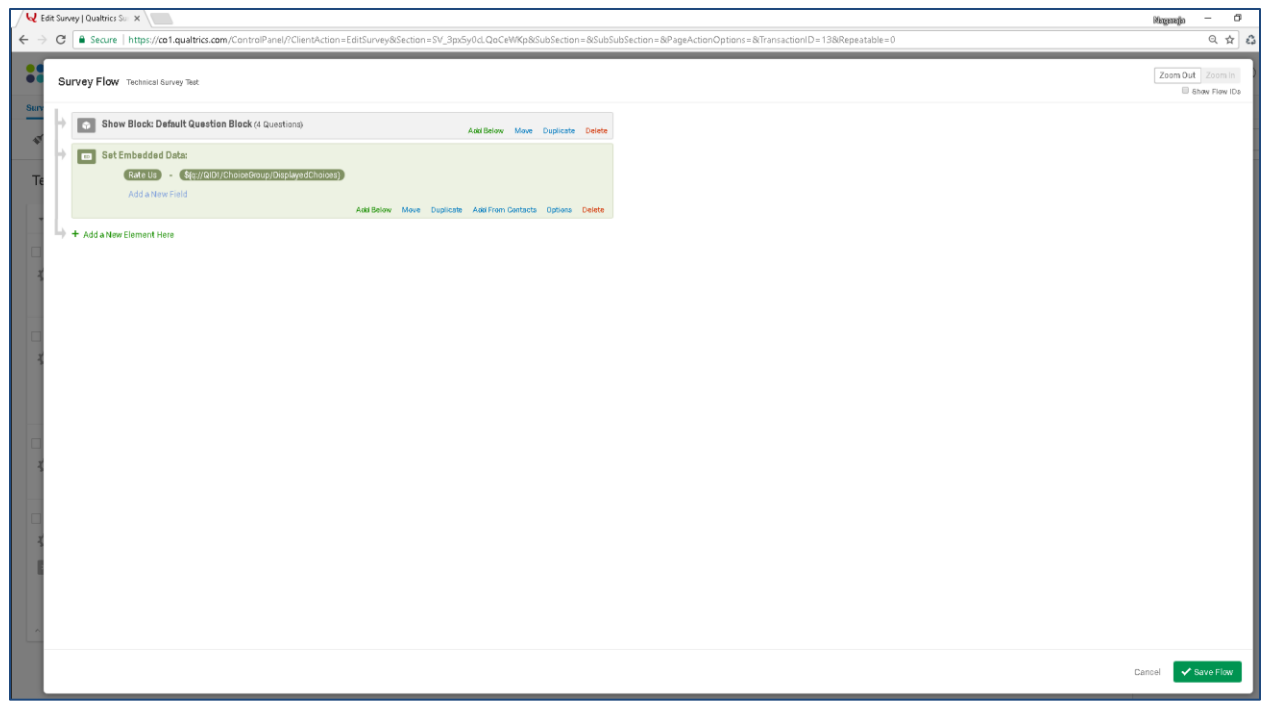


20. Click on Embedded Data

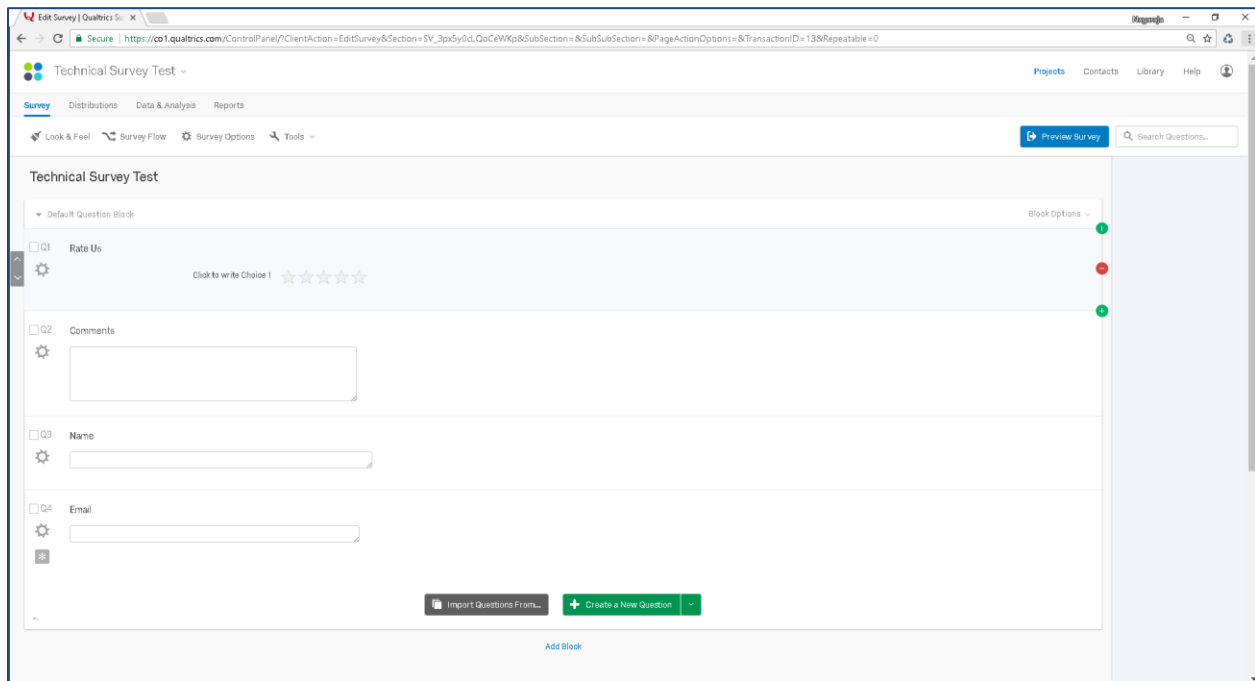


21. Update the filed name 'Enter Embedded Data Field Name Here...' and click on Set a value Now to set the Embedded filed



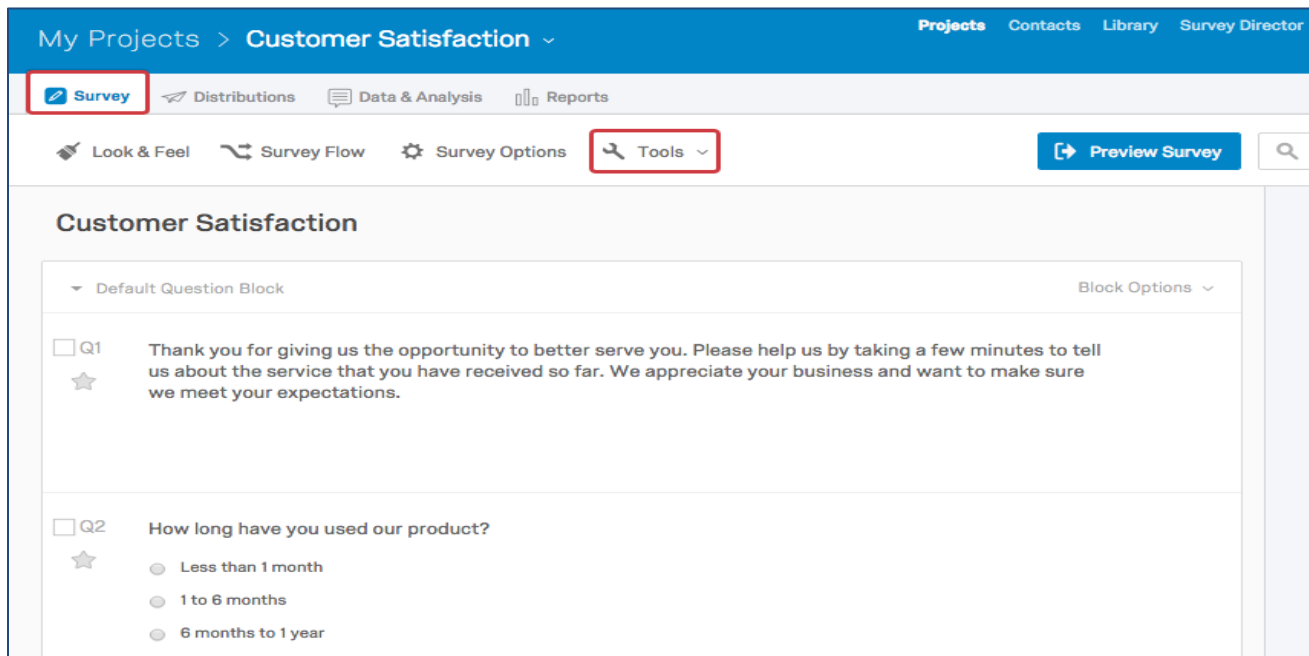


22. Click on Save Flow

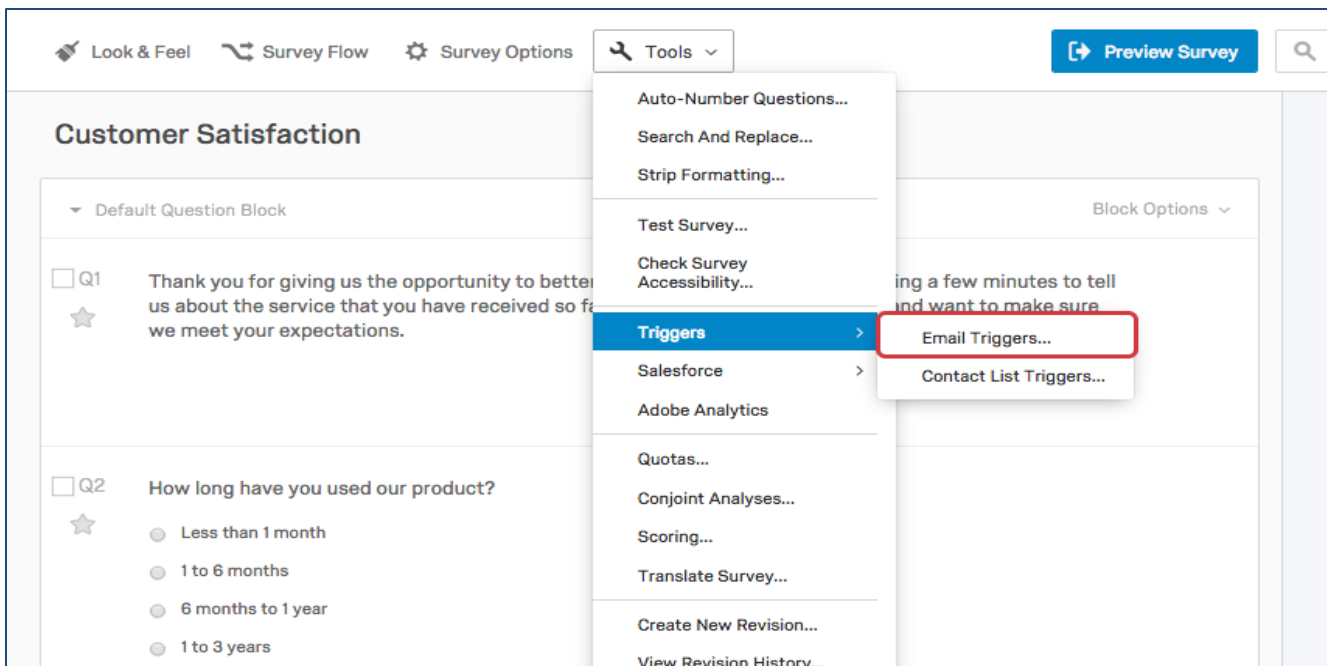


6.2.1.5 Setting Up Email Triggers

1. Navigate to the Survey tab and click Tools.



2. Hover over Triggers and select Email Triggers.



3. Click Add a Condition to set the trigger to send when the survey is completed AND a specified condition is met (if you choose not to add a condition, the Email Trigger will be sent any time a respondent completes the survey).

*Note: A partial complete will only cause an Email Trigger to send an email if the trigger has a condition that was met by the partial complete. Otherwise, partial completes will not cause an Email trigger to send an email when recorded.

4. Fill in the To Email Address form field with the recipient's email address if it is different from your default email.

Look & Fe

customer

Default Qu

Q1 The to t mal

Q2 How

Q3 How

ions...

Send An Email On Survey Complete: [Add a Condition](#)

To Email Address:

From Name:

Reply-To Email:

Subject:

Message:

{a}

Font - Size - B I U x₂ x² A⁻ A⁺ Source

When:

Include Response ☒


Report

Show Full Question ☐

Text

[Finish Editing](#)

*Note: You can send the Email Trigger to multiple individuals at once by adding comma-separated emails in this field. See the [Triggering Email to Respondents](#) section below for more options and information.

- ☒  **Send An Email On Survey Complete:** [Add a Condition](#)









To Email Address:



From Name:









Reply-To Email:









Subject:



Message:


{a}        



       


       

 **Font** 

Size 

B **I** **U** **x₂** **x²**

 **Source**

When:

Include Response ☒


Report

Show Full Question ☐

Text

[Finish Editing](#)

6. Type a Subject and a Message for your trigger. Use the [Rich Content Editor](#) features to customize your message

☒  Send An Email On Survey Complete: [Add a Condition](#)

To Email Address:









From Name:



Reply-To Email:






















Subject:



Message:

{a}
















Font -

Size -





Source

Thank you for your feedback!

When:

Include Response ☒

Report

Show Full Question ☐

Text

[Finish Editing](#)

7. Select the When dropdown menu to choose how long of a delay should be applied to the trigger (by default, it will send immediately after a respondent finishes the survey, but you can choose different delay times from as short as one hour to as long as 28 days).
- 8.

The screenshot shows the 'Send An Email On Survey Complete' configuration window in Qualtrics. At the top, there is a green checkmark icon and a blue envelope icon, followed by the text 'Send An Email On Survey Complete: Add a Condition'. Below this, there are four input fields: 'To Email Address' (example@qualtrics.com), 'From Name' (Example Name), 'Reply-To Email' (noreply@qualtrics.com), and 'Subject' (Customer Satisfaction Feedback). Under the 'Message:' label, there is a rich text editor with a toolbar containing icons for text, image, link, unlink, list, and table. The text area contains 'Thank you for your feedback!'. Below the message editor, there is a 'When:' dropdown menu with 'Send immediately' selected, which is highlighted with a red rectangle. Below the dropdown, there are two checkboxes: 'Include Response' (checked) and 'Show Full Question' (unchecked). At the bottom right, there is a 'Finish Editing' link. At the very bottom, there are two buttons: 'Close Without Saving' (red) and 'Save Triggers' (green).

*Note: Because of the nature of how emails are triggered, it is not possible to specify the exact time and date that the email will send (since the specified date may already have passed by the time the respondent finishes their survey).

9. Decide if Include Response Report and Show Full Question Text are appropriate for this e-mail.

Look & Fe

customer

Default Qu

Q1 Tha to t mal

Q2 How

Q3 How

ions...

☒ Send An Email On Survey Complete: [Add a Condition](#)

To Email Address:

From Name:

Reply-To Email:

Subject:

Message:

Thank you for your feedback!

When:

☒ Include Response Report

☐ Show Full Question Text

[Finish Editing](#)

[Close Without Saving](#) [Save Triggers](#)

*Note: Include Response Report adds a summary of the questions and respondent's answers to the body of the email (as well as includes a link to an online version). Show Full Question Text displays the entire text for each question in the response report instead of clipping longer text.

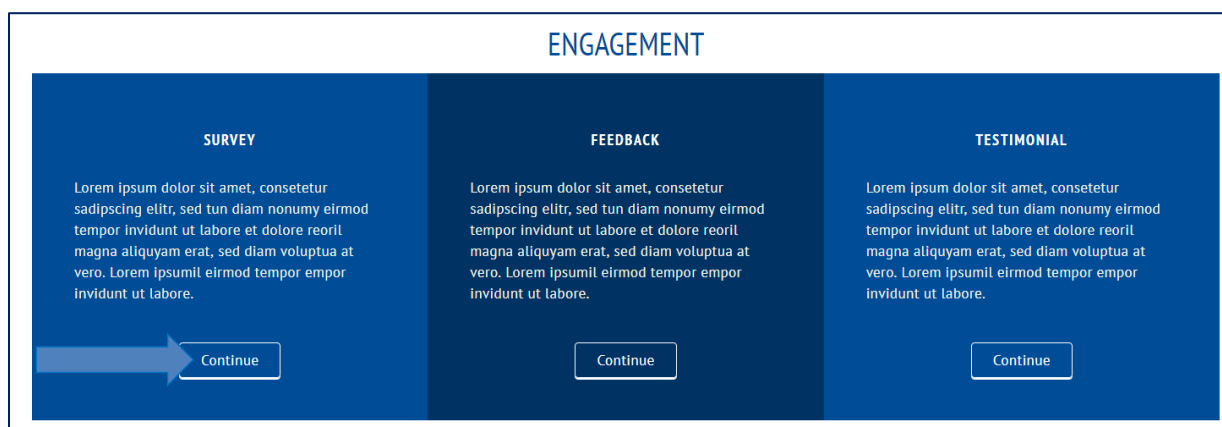
10. Click Save Triggers to save and return to the Survey tab.

*Note: Remove an Email Trigger by clicking Finish Editing and then delete.

You can add as many Email Triggers as you want, ch

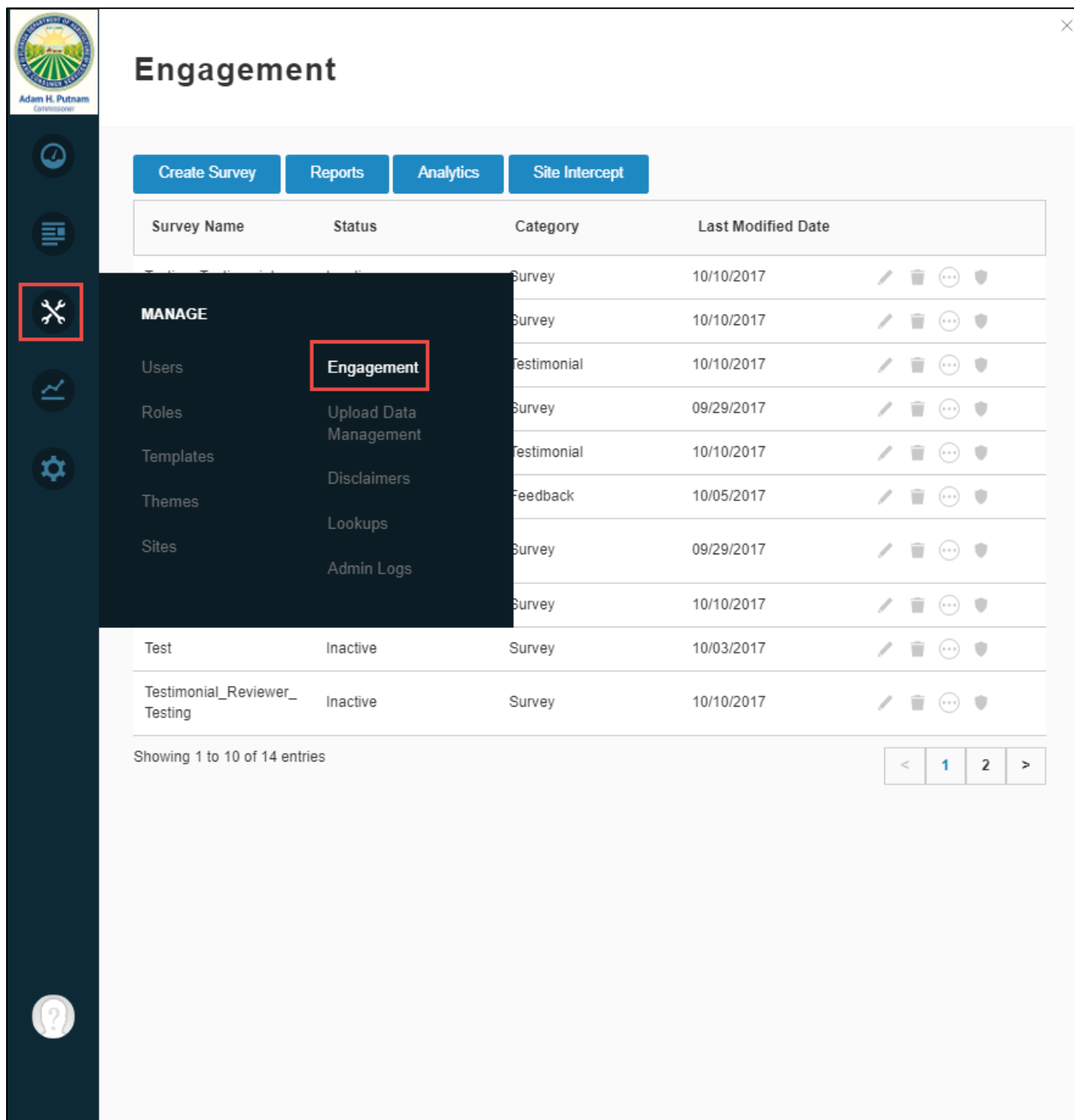
6.2.1.6 Survey List

To view a list of available surveys, select “Surveys” under “Engagement” on the main top menu of the home page or click the “Continue” button for Surveys in the Engagement section of the Homepage. The system will display a pop up window with a table list of available surveys.



6.3 Engagement Administration

To navigate to Engagement, login to the application with an admin account. Next, click the “Manage” icon from the admin menu located on the left side of the screen and click “Engagement”.




The screenshot shows the 'Engagement' administration page. On the left, a dark sidebar contains a 'MANAGE' menu with options: Users, Roles, Templates, Themes, Sites, Upload Data, Management, Disclaimers, Lookups, and Admin Logs. The 'Engagement' option is highlighted with a red box. The main content area has a header 'Engagement' and four buttons: 'Create Survey', 'Reports', 'Analytics', and 'Site Intercept'. Below these is a table with columns: Survey Name, Status, Category, Last Modified Date, and action icons. The table lists 14 entries, with the first 10 visible. The bottom of the page shows 'Showing 1 to 10 of 14 entries' and a pagination control with buttons for '<', '1', '2', and '>'.

Survey Name	Status	Category	Last Modified Date	Action
Survey	Inactive	Survey	10/10/2017	[Edit] [Delete] [More] [Shield]
Survey	Inactive	Survey	10/10/2017	[Edit] [Delete] [More] [Shield]
Testimonial	Inactive	Testimonial	10/10/2017	[Edit] [Delete] [More] [Shield]
Survey	Inactive	Survey	09/29/2017	[Edit] [Delete] [More] [Shield]
Testimonial	Inactive	Testimonial	10/10/2017	[Edit] [Delete] [More] [Shield]
Feedback	Inactive	Feedback	10/05/2017	[Edit] [Delete] [More] [Shield]
Survey	Inactive	Survey	09/29/2017	[Edit] [Delete] [More] [Shield]
Survey	Inactive	Survey	10/10/2017	[Edit] [Delete] [More] [Shield]
Test	Inactive	Survey	10/03/2017	[Edit] [Delete] [More] [Shield]
Testimonial_Reviewer_Testing	Inactive	Survey	10/10/2017	[Edit] [Delete] [More] [Shield]

6.3.1 Create Survey/View Report/View Analytics









































To create surveys, view Engagement Reports and/or view Engagement analytics click the provided buttons to be redirected to the Qualtrics site to perform any of these functions. Further Instructions for these activities are located in the Operations Manual.



Adam H. Putnam
Commissioner

Engagement

[Create Survey](#)[Reports](#)[Analytics](#)[Site Intercept](#)

Survey Name	Status	Category	Last Modified Date	
Testing_Testimonial	Inactive	Survey	10/10/2017	   
Testimonial_Testing	Inactive	Survey	10/10/2017	   
Testimonial_Reviewer	Active	Testimonial	10/10/2017	   
Technical Survey Test	Inactive	Survey	09/29/2017	   
Testimonial	Active	Testimonial	10/10/2017	   
Feedback	Active	Feedback	10/05/2017	   
Technical Survey Test Review	Inactive	Survey	09/29/2017	   
Testimonial_Testing	Inactive	Survey	10/10/2017	   
Test	Inactive	Survey	10/03/2017	   
Testimonial_Reviewer_Testing	Inactive	Survey	10/10/2017	   

Showing 1 to 10 of 14 entries

[<](#)[1](#)[2](#)[>](#)

6.3.2 Edit Survey

The Survey name, status and category are the three fields that can be edited for a survey. To edit these fields, click the “Edit” icon for the Survey that needs to be updated.

The screenshot shows the 'Engage' dashboard with a sidebar on the left containing navigation icons. The main content area has a header 'Engagement' and four tabs: 'Create Survey', 'Reports', 'Analytics', and 'Site Intercept'. Below the tabs is a table listing surveys. The first row, 'Testing_Testimonial', is highlighted with a red box around its edit icon (a pencil). The table has columns for 'Survey Name', 'Status', 'Category', and 'Last Modified Date'. Below the table, it says 'Showing 1 to 10 of 14 entries' and has pagination controls for pages 1 and 2.

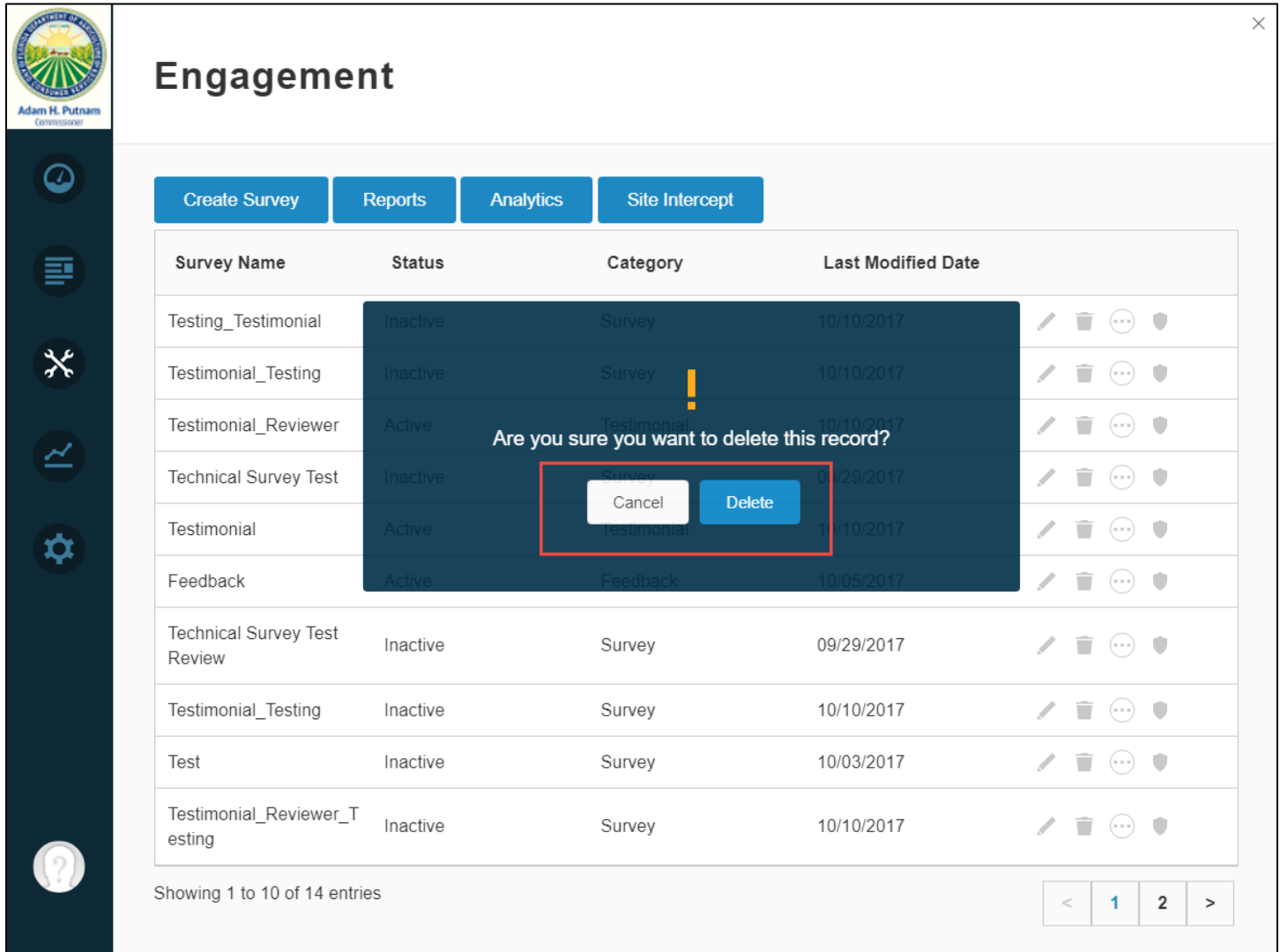
Survey Name	Status	Category	Last Modified Date
Testing_Testimonial	Inactive	Survey	10/10/2017
Testimonial_Testing	Inactive	Survey	10/10/2017
Testimonial_Reviewer	Active	Testimonial	10/10/2017
Technical Survey Test	Inactive	Survey	09/29/2017
Testimonial	Active	Testimonial	10/10/2017
Feedback	Active	Feedback	10/05/2017
Technical Survey Test Review	Inactive	Survey	09/29/2017
Testimonial_Testing	Inactive	Survey	10/10/2017
Test	Inactive	Survey	10/03/2017
Testimonial_Reviewer_Testing	Inactive	Survey	10/10/2017

Next, make any necessary changes and click the “Save” button. If no changes are needed, click the “Cancel” button. To edit the survey questions or survey format the admin will be required logging into Qualtrics. Further instructions for these type of activities are in the Operations Manual.

The screenshot shows the 'Engage' dashboard with a 'Survey Details' modal open. The modal has three input fields: 'Survey Name', 'Status', and 'Category'. The 'Survey Name' field is empty, while 'Status' is set to 'Active' and 'Category' is empty. There are 'Cancel' and 'Save' buttons at the bottom right of the modal. The background shows the same survey list as the previous screenshot.

6.3.3 Delete Survey

To delete a survey, click the “Delete” button for the survey that needs to be deleted. A confirmation message will pop up asking if the user is sure that they want the record deleted. To continue with the deletion of the survey, click “Delete”. If the user would like to abort the deletion, click “Cancel”.



The screenshot shows the 'Engagement' dashboard with a table of survey records. A confirmation dialog is overlaid on the table, asking 'Are you sure you want to delete this record?'. The dialog has 'Cancel' and 'Delete' buttons. The 'Delete' button is highlighted with a red rectangle. The table has columns: Survey Name, Status, Category, Last Modified Date, and action icons (edit, delete, more, lock).

Survey Name	Status	Category	Last Modified Date	Action
Testing_Testimonial	Inactive	Survey	10/10/2017	[Edit] [Delete] [More] [Lock]
Testimonial_Testing	Inactive	Survey	10/10/2017	[Edit] [Delete] [More] [Lock]
Testimonial_Reviewer	Active	Survey	10/10/2017	[Edit] [Delete] [More] [Lock]
Technical Survey Test	Inactive	Survey	09/29/2017	[Edit] [Delete] [More] [Lock]
Testimonial	Active	Testimonial	10/10/2017	[Edit] [Delete] [More] [Lock]
Feedback	Active	Feedback	10/05/2017	[Edit] [Delete] [More] [Lock]
Technical Survey Test Review	Inactive	Survey	09/29/2017	[Edit] [Delete] [More] [Lock]
Testimonial_Testing	Inactive	Survey	10/10/2017	[Edit] [Delete] [More] [Lock]
Test	Inactive	Survey	10/03/2017	[Edit] [Delete] [More] [Lock]
Testimonial_Reviewer_Testing	Inactive	Survey	10/10/2017	[Edit] [Delete] [More] [Lock]

Showing 1 to 10 of 14 entries

< 1 2 >

6.3.4 Responses

To view responses to a survey click the “Responses” icon.

































Engagement

Create Survey

Reports

Analytics

Site Intercept


Survey Name	Status	Category	Last Modified Date	
Testing_Testimonial	Inactive	Survey	10/10/2017	  
Testimonial_Testing	Inactive	Survey	10/10/2017	  
Testimonial_Reviewer	Active	Testimonial	10/10/2017	  
Technical Survey Test	Inactive	Survey	09/29/2017	  
Testimonial	Active	Testimonial	10/10/2017	  
Feedback	Active	Feedback	10/05/2017	  
Technical Survey Test Review	Inactive	Survey	09/29/2017	  
Testimonial_Testing	Inactive	Survey	10/10/2017	  
Test	Inactive	Survey	10/03/2017	  
Testimonial_Reviewer_Testing	Inactive	Survey	10/10/2017	  

Showing 1 to 10 of 14 entries

< 1 2 >

6.3.5 Site Intercept









































To see the list of Site Intercept Configurations, click the “Site Intercept” button.



Adam H. Putnam
Commissioner

Engagement

Create SurveyReportsAnalytics**Site Intercept**


Survey Name	Status	Category	Last Modified Date	
Testing_Testimonial	Inactive	Survey	10/10/2017	   
Testimonial_Testing	Inactive	Survey	10/10/2017	   
Testimonial_Reviewer	Active	Testimonial	10/10/2017	   
Technical Survey Test	Inactive	Survey	09/29/2017	   
Testimonial	Active	Testimonial	10/10/2017	   
Feedback	Active	Feedback	10/05/2017	   
Technical Survey Test Review	Inactive	Survey	09/29/2017	   
Testimonial_Testing	Inactive	Survey	10/10/2017	   
Test	Inactive	Survey	10/03/2017	   
Testimonial_Reviewer_Testing	Inactive	Survey	10/10/2017	   

Showing 1 to 10 of 14 entries

<12>

6.3.6 Create Site Intercept

To create a Site Intercept, click the “Create Site Intercept” button. The user will be redirected to the Qualtrics and will need to login to create a Site Intercept. Further information regarding this process is located in the Operations Manual.









Adam H. Putnam
Commissioner

Site Intercept Configuration

< BACK TO LIST

[Create SiteIntercept](#)[Update SiteIntercept in Road Map](#)


Survey Name	Page	Last Modified Date	
Conditional Survey	HOME	10/04/2017	 
Feedback	ABOUT	10/04/2017	 
Testimonial_Reviewer	HOME	09/29/2017	 

Showing 1 to 3 of 3 entries

< 1 >

6.3.7 Edit Site Intercept

To edit a Site Intercept, click the “Edit” button.









Adam H. Putnam
Commissioner

Site Intercept Configuration

< BACK TO LIST

[Create SiteIntercept](#)[Update SiteIntercept in Road Map](#)

Survey Name	Page	Last Modified Date	
Conditional Survey	HOME	10/04/2017	 
Feedback	ABOUT	10/04/2017	 
Testimonial_Reviewer	HOME	09/29/2017	 

Showing 1 to 3 of 3 entries

< 1 >



Adam H. Putnam
Commissioner

[← BACK TO LIST](#)

Conditional Survey

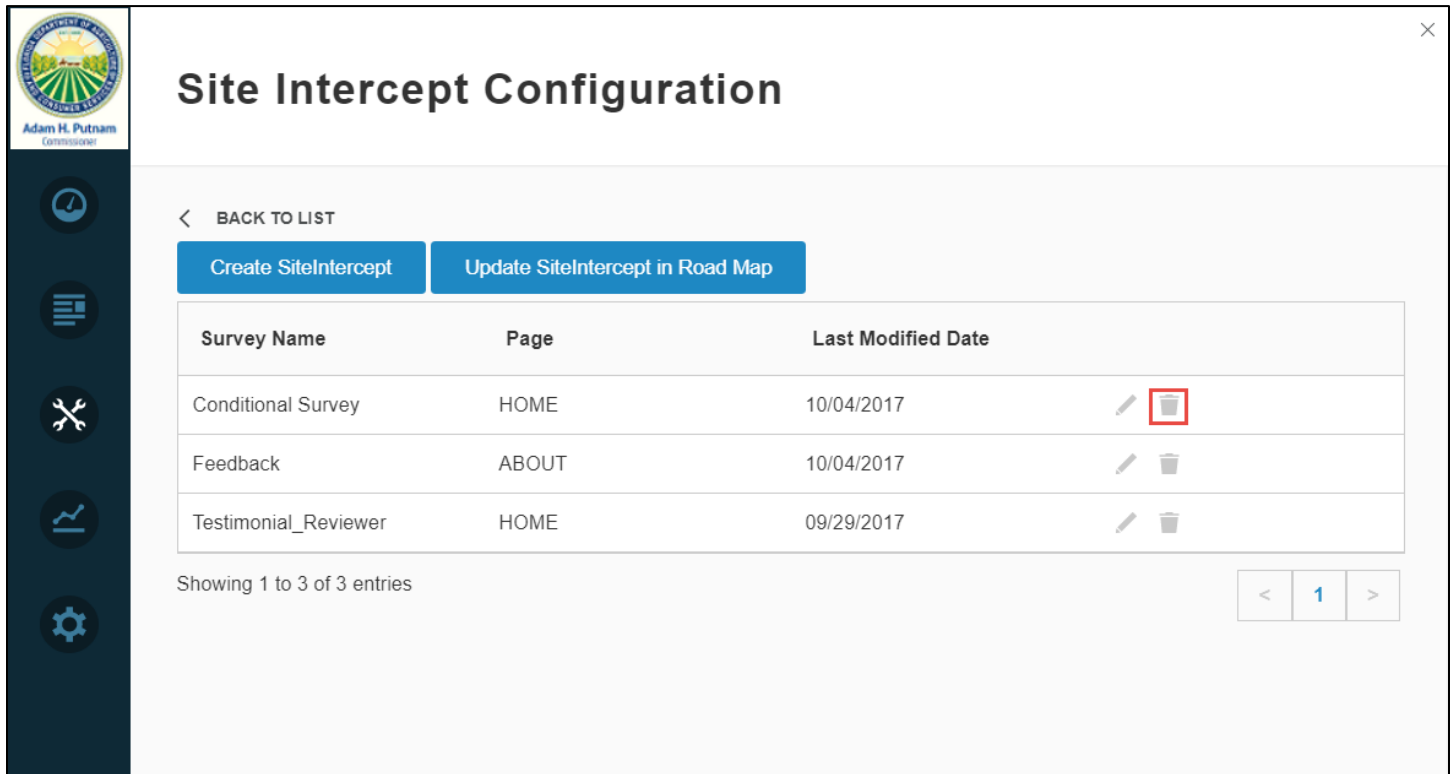
[HOME](#)

```
(function(){var g=function(e,h,i,g){  
this.get=function(a){for(var a=a+"=",c=document.cookie.split(";"),b=0,e=c.length;b<e;b++){for(var d=c[b],"  
"==d.charAt(0);)d=d.substring(1,d.length);if(0==d.indexOf(a))return d.substring(a.length,d.length)}return null};  
this.set=function(a,c){var b="",b=new Date,b.setTime(b.getTime()+6048E5);b="";  
expires=" "+b.toGMTString();document.cookie=a+"="+c+b+"; path=/; ";  
this.check=function(){var a=this.get(f);if(a)a=a.split("");else if(100!=e)"v"==h&&(e=Math.random())>e/100?0:100,a=[  
h,e,0],this.set(f,a.join(""));else return 0;var c=a[1];if(100==c)return 0;switch(a[0]){case "v":return 1;case "r":return  
c=a[2]%Math.floor(100/c),a[2]++;this.set(f,a.join(""));!c}return 0};  
this.go=function(){if(this.check()){var a=document.createElement("script");a.type="text/javascript";a.src=g+"&t="+ (new  
Date()).getTime();document.body&&document.body.appendChild(a)};  
this.startFunction(function(a=this.window.addEvent,this.window.addEvent,this.intercept,"load") function()
```







Save

6.3.8 Delete Site Intercept

To delete a Site Intercept, click the delete button for the Site Intercept to be deleted.

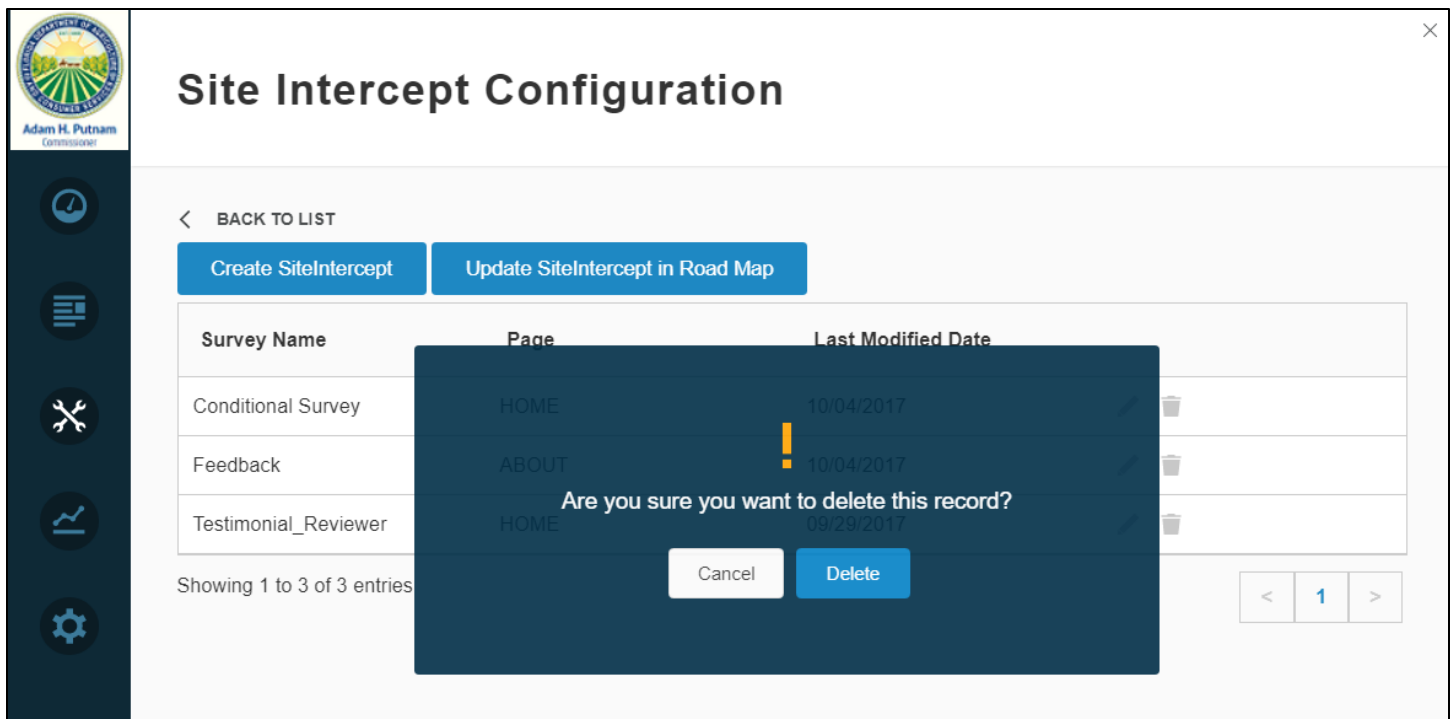


The screenshot shows the 'Site Intercept Configuration' page. On the left is a dark sidebar with icons for a clock, list, wrench, line graph, and settings. The main content area has a header with the Florida Department of Agriculture and Consumer Services logo and the name 'Adam H. Putnam, Commissioner'. Below the header is a 'BACK TO LIST' link and two buttons: 'Create SiteIntercept' and 'Update SiteIntercept in Road Map'. A table lists three site intercepts:

Survey Name	Page	Last Modified Date	
Conditional Survey	HOME	10/04/2017	 
Feedback	ABOUT	10/04/2017	 
Testimonial_Reviewer	HOME	09/29/2017	 

Below the table, it says 'Showing 1 to 3 of 3 entries' and there are pagination controls with '<', '1', and '>'.

A confirmation message will ask the user to confirm the deletion of the selected site intercept. Click the “Delete” button to remove the selected site intercept.



This screenshot shows the same 'Site Intercept Configuration' page as before, but with a confirmation dialog box overlaid in the center. The dialog box is dark blue with a yellow exclamation mark icon and contains the text: 'Are you sure you want to delete this record?'. At the bottom of the dialog are two buttons: 'Cancel' and 'Delete'.

7 Administration

7.1 Manage Users


7.1.1 View Users

To view the Users List, login with an administrator account. Next, click the “Manage” icon on the admin menu on the left side of the screen. The system will display the list of users.

The screenshot shows the 'Users' management page. On the left, a dark sidebar contains a 'MANAGE' menu with options: Users, Roles, Templates, Themes, Sites, Engagement, Upload Data Management, Disclaimers, Lookups, and Admin Logs. The 'Users' option is highlighted with a red box. The main content area is titled 'Users' and features a search bar and a table of users. The table has columns for NAME, EMAIL, and JOINED. The first user is 'epicgroupplc\antonio' with email 'antonio@epicgrou...' and joined date '10/05/2017'. The second user is 'antonio@epicgrou...' with joined date '09/26/2017'. The third user is 'antonio@epicgrou...' with joined date '09/26/2017'. The fourth user is 'epicgroupplc\antonio' with joined date '09/26/2017'. Each user row has a set of icons for actions: a heart, a shield, a gear, a person, and a three-dot menu.

NAME	EMAIL	JOINED
epicgroupplc\antonio	antonio@epicgrou...	10/05/2017
antonio@epicgrou...	antonio@epicgrou...	09/26/2017
antonio@epicgrou...	antonio@epicgrou...	09/26/2017
epicgroupplc\antonio		09/26/2017

There are multiple options that can be managed for each user from the user list. These options are View User Activity, View User Roles, View User Account Settings, View Profile, View Assets, Change Password, Send Password Reset Link, Authorize/Un-Authorize User, Delete User, Make Super User and Login as User.














Adam H. Putnam
Commissioner

Users

Add User

Show: Authorized

Search Users

	NAME	EMAIL	JOINED	
	AdminUser Account adminuser	satish@epicgrouppl...	09/27/2017	    
	marshall mmathers	antonio@epicgrou...	09/26/2017	
	jermaine jcole	antonio@epicgrou...	09/26/2017	
	kendrick klamar	antonio@epicgrou...	09/26/2017	
	Antonio R. Watson epicgrouppllc\antonio		09/26/2017	
	jack will jackwill	jackwill@test.com	09/26/2017	

View Profile

View Assets

Change Password

Force Password Change

Send Password Reset Link

Un-Authorize User


Delete User

Make Super User

Login As User

7.1.2 Search Users

To search the Users List, start typing into the search box and the system will return matching results.









Users

Add User


Show: All

Gary

	NAME	EMAIL	JOINED	
	Gary Miller epicgroupplc\garym	gary@epicgroupplc....	08/31/2017	    

7.1.3 Add Users

To add a user, click the “Add User” button.



Users


Add User

Show: All

Search Users

NAME	EMAIL	JOINED
<div><div>First Name: ⓘ</div><div>Last Name: ⓘ</div><div>User Name: ⓘ</div><div>Email Address: ⓘ</div><div>Authorized: On</div><div>Random Password: Off</div><div>Password: ⓘ</div><div>Confirm Password: ⓘ</div><div><input type="checkbox"/> Send An Email To New User.</div><div>Cancel Save</div></div>		

Next, Fill in the required information, select the user as “Authorized” and enter a password and confirm the password and then click the “Save” button.



Adam H. Putnam
Commissioner

Users

Add User

Show: All | Search Users

NAME	EMAIL	JOINED
-		

First Name: ⓘ

Last Name: ⓘ

User Name: ⓘ

Email Address: ⓘ

Authorized: On ☒ Random Password: Off ☐

Password: ⓘ

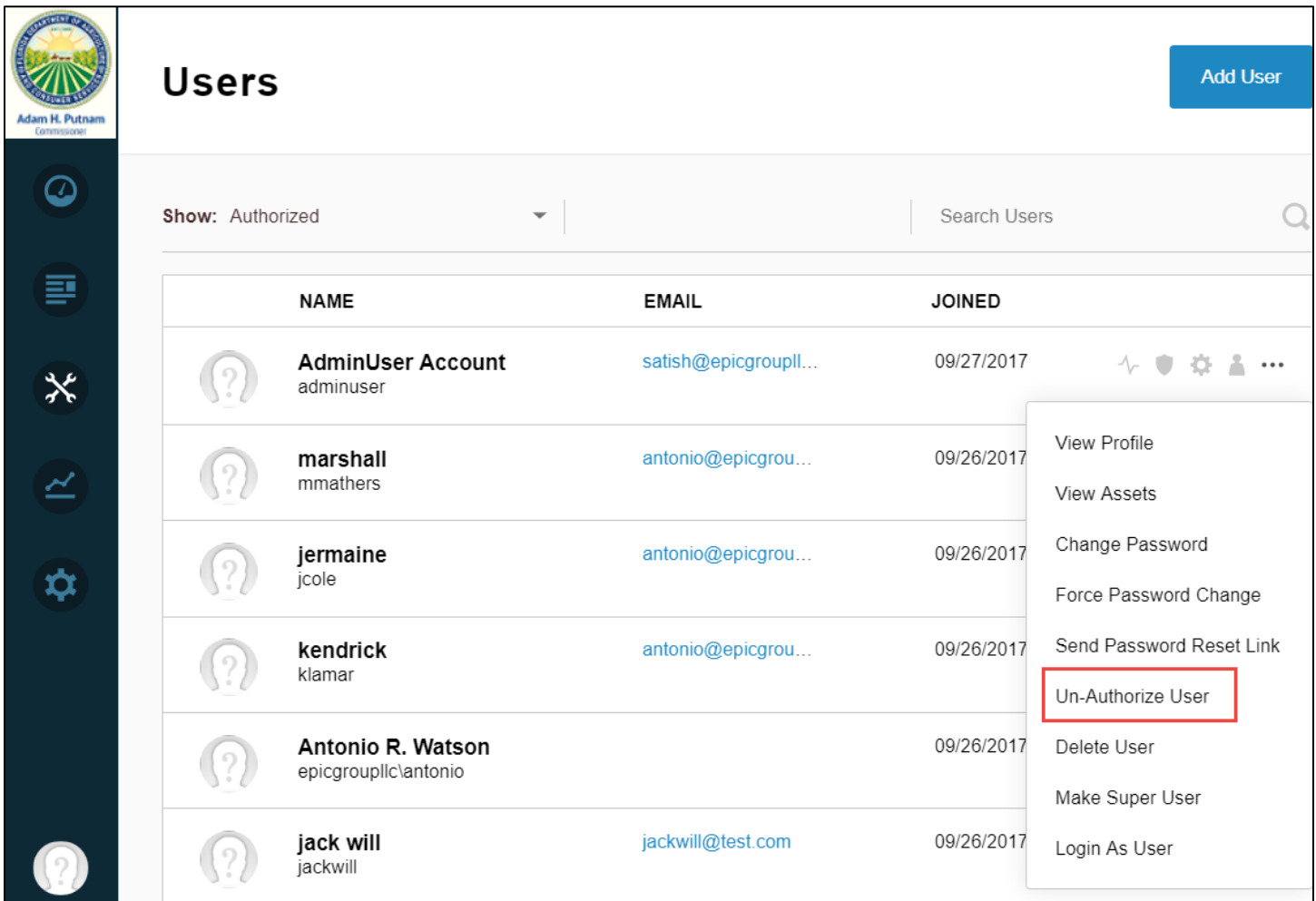
Confirm Password: ⓘ

☐ Send An Email To New User.

Cancel Save








7.1.4 Un-Authorize Users

To shut down a user account click on the “...” menu icon for that user and click Un-Authorize User. The system will deactivate the user account.



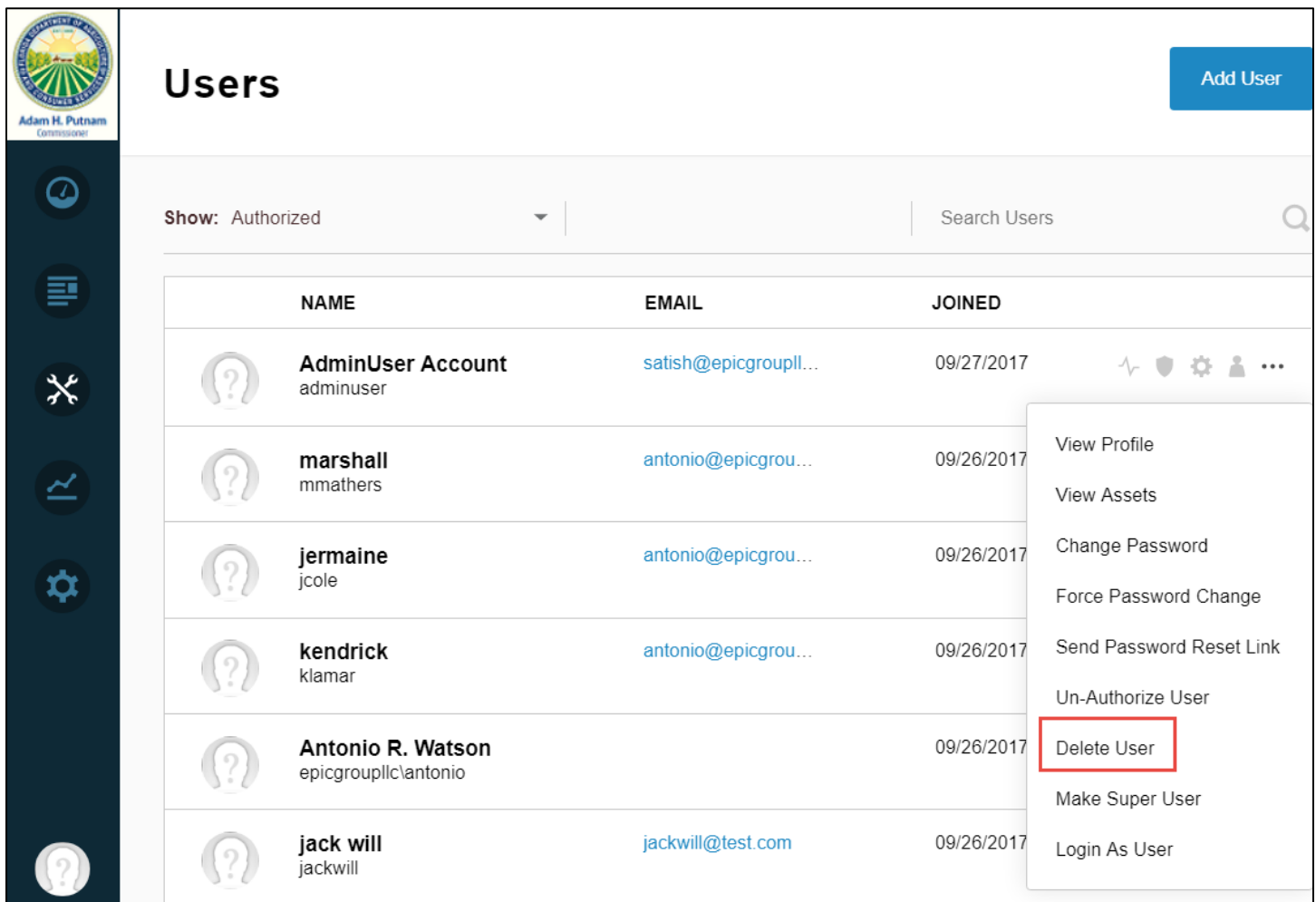
Users Add User

Show: Authorized | Search Users

NAME	EMAIL	JOINED	
 AdminUser Account adminuser	satish@epicgrouppl...	09/27/2017	
 marshall mmathers	antonio@epicgrou...	09/26/2017	
 jermaine jcole	antonio@epicgrou...	09/26/2017	
 kendrick klamar	antonio@epicgrou...	09/26/2017	
 Antonio R. Watson epicgrouppllc\antonio		09/26/2017	
 jack will jackwill	jackwill@test.com	09/26/2017	<div><div>View Profile</div><div>View Assets</div><div>Change Password</div><div>Force Password Change</div><div>Send Password Reset Link</div><div>Un-Authorize User</div><div>Delete User</div><div>Make Super User</div><div>Login As User</div></div>








7.1.5 Delete Users

To delete a user account click on the “...” menu icon for that user and click the delete button. The system will ask for confirmation to delete the user. Click the “Ok” button to delete the user from the system.



Users Add User


Show: Authorized | Search Users

NAME	EMAIL	JOINED	
 AdminUser Account adminuser	satish@epicgrouppl...	09/27/2017	
 marshall mmathers	antonio@epicgrou...	09/26/2017	
 jermaine jcole	antonio@epicgrou...	09/26/2017	
 kendrick klamar	antonio@epicgrou...	09/26/2017	
 Antonio R. Watson epicgrouppllc\antonio		09/26/2017	
 jack will jackwill	jackwill@test.com	09/26/2017	

- View Profile
- View Assets
- Change Password
- Force Password Change
- Send Password Reset Link
- Un-Authorize User
- Delete User**
- Make Super User
- Login As User

7.1.6 View User Roles

User Roles provides the admin the ability to view user roles or assign roles to the user. To view a user's role from the Users List, click the "Users Role" button for the user to be viewed.














Adam H. Putnam
Commissioner

Users

Add User

Show: Authorized ▼ | Search Users 🔍

	NAME	EMAIL	JOINED	
	AdminUser Account adminuser	satish@epicgrouppl...	09/27/2017	    
	marshall mmathers	antonio@epicgrou...	09/26/2017	
	jermaine jcole	antonio@epicgrou...	09/26/2017	
	kendrick klamar	antonio@epicgrou...	09/26/2017	
	Antonio R. Watson epicgrouppllc\antonio		09/26/2017	
	jack will jackwill	jackwill@test.com	09/26/2017	

View Profile

View Assets

Change Password

Force Password Change

Send Password Reset Link


Un-Authorize User

Delete User

Make Super User


Login As User

The system will display a list of the user's assigned roles. To add a role, start typing the name of the role and then click the role. Once the role is selected, click the "Add" button. The system will add the role to the user.








Users

Add User



Gary Miller
epicgroupllc\garym

gary@epicgroupllc....08/31/2017



ROLES


☒ Send Email

+ Add

ROLE	START	EXPIRES
Administrators	-	-
Registered Users	-	-
Subscribers	-	-
Public Users	09/19/2017	-

7.1.7 View User Activity

User activity allows the admin to view when the user was last active, joined the site, recent activity and when they joined.














Adam H. Putnam
Commissioner

Users

Add User

Show: Authorized | Search Users

	NAME	EMAIL	JOINED	
	AdminUser Account adminuser	satish@epicgrouppl...	09/27/2017	    
	marshall mmathers	antonio@epicgrou...	09/26/2017	
	jermaine jcole	antonio@epicgrou...	09/26/2017	
	kendrick klamar	antonio@epicgrou...	09/26/2017	
	Antonio R. Watson epicgrouppllc\antonio		09/26/2017	
	jack will jackwill	jackwill@test.com	09/26/2017	

View Profile

View Assets

Change Password

Force Password Change

Send Password Reset Link

Un-Authorize User

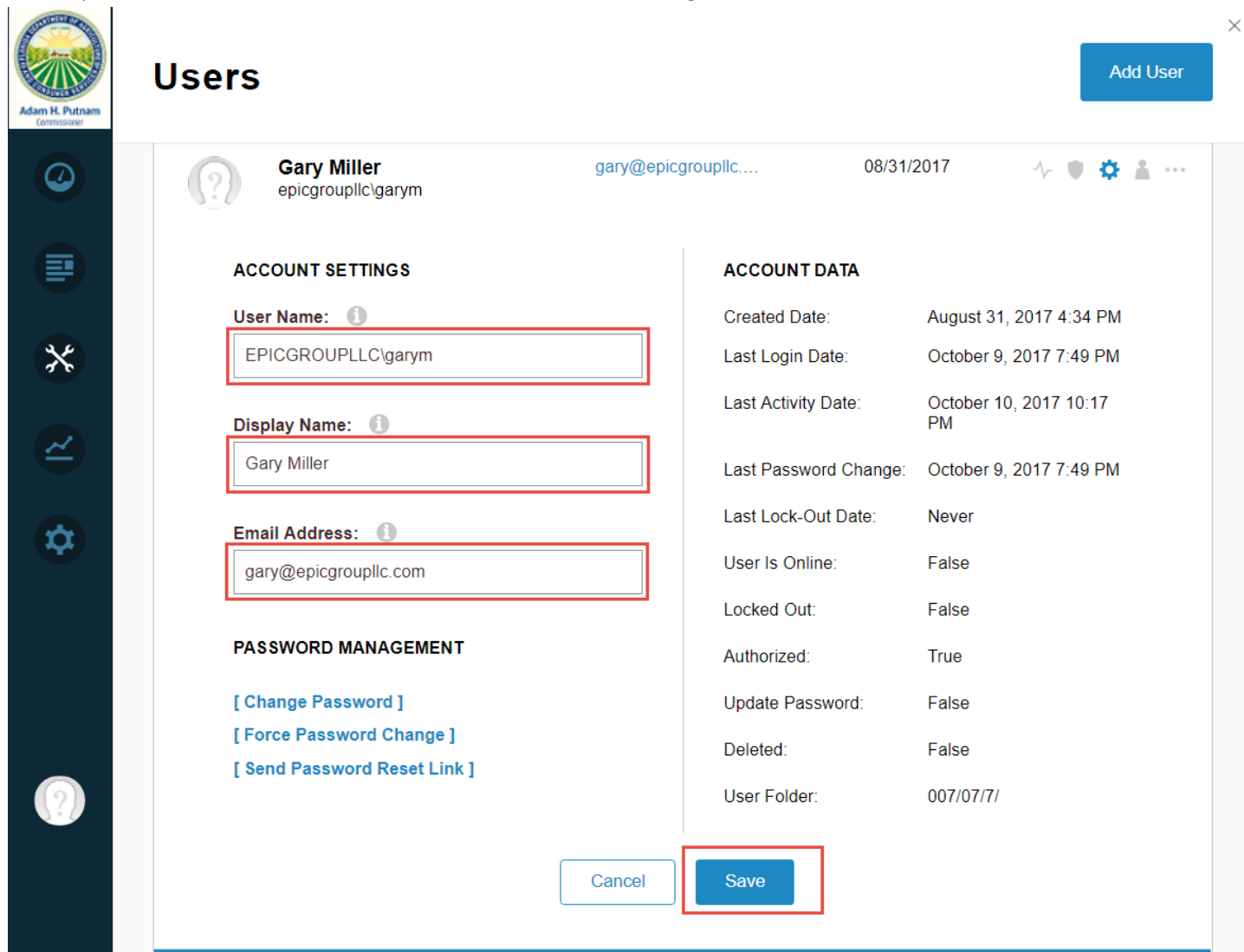
Delete User

Make Super User

Login As User

7.1.8 View User Account Settings

User Account Settings allow the admin to View/Edit user name, user display name and user email address. To edit any of these click inside the text box and overwrite with changes and then click the save button.



The screenshot displays the 'Users' management page. On the left is a dark sidebar with icons for dashboard, list, tools, analytics, settings, and help. The main content area is titled 'Users' and features a blue 'Add User' button in the top right. Below the title, the user profile for 'Gary Miller' (epicgrouppllc\garym) is shown, including the email 'gary@epicgrouppllc.com' and the date '08/31/2017'. The settings are divided into two columns: 'ACCOUNT SETTINGS' and 'ACCOUNT DATA'. The 'ACCOUNT SETTINGS' column contains three text input fields for 'User Name' (EPICGROUPLLC\garym), 'Display Name' (Gary Miller), and 'Email Address' (gary@epicgrouppllc.com), each with an information icon. Below these is a 'PASSWORD MANAGEMENT' section with links for 'Change Password', 'Force Password Change', and 'Send Password Reset Link'. The 'ACCOUNT DATA' column lists various system metrics such as 'Created Date', 'Last Login Date', 'Last Activity Date', 'Last Password Change', 'Last Lock-Out Date', 'User Is Online', 'Locked Out', 'Authorized', 'Update Password', 'Deleted', and 'User Folder'. At the bottom of the settings area are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.


ACCOUNT SETTINGS	
User Name:	EPICGROUPLLC\garym
Display Name:	Gary Miller
Email Address:	gary@epicgrouppllc.com

ACCOUNT DATA	
Created Date:	August 31, 2017 4:34 PM
Last Login Date:	October 9, 2017 7:49 PM
Last Activity Date:	October 10, 2017 10:17 PM
Last Password Change:	October 9, 2017 7:49 PM
Last Lock-Out Date:	Never
User Is Online:	False
Locked Out:	False
Authorized:	True
Update Password:	False
Deleted:	False
User Folder:	007/07/7/

[\[Change Password \]](#)
[\[Force Password Change \]](#)
[\[Send Password Reset Link \]](#)

7.1.9 User Account Data


The User Account Settings also shows information about the account such as created date, last login date, last activity date, last password change, last lock-out date, user online status and authorized status.



Adam H. Putnam
Commissioner






Users

Add User



Gary Miller
epicgrouppllc\garym

gary@epicgroupplc....08/31/2017



ACCOUNT SETTINGS

User Name: ⓘ
EPICGROUPLLC\garym

Display Name: ⓘ
Gary Miller

Email Address: ⓘ
gary@epicgroupplc.com

PASSWORD MANAGEMENT

[\[Change Password \]](#)

[\[Force Password Change \]](#)

[\[Send Password Reset Link \]](#)

ACCOUNT DATA

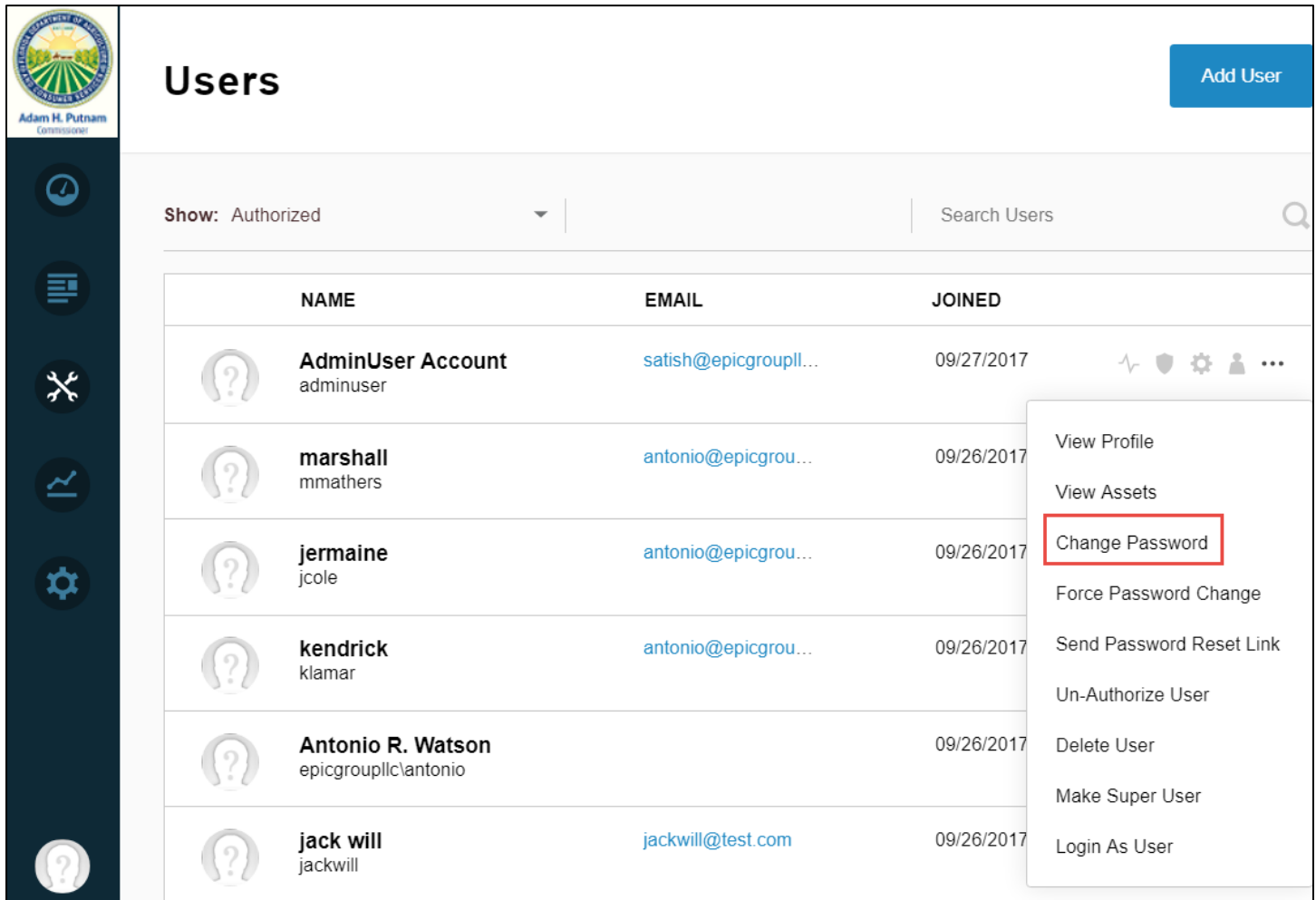
Created Date:	August 31, 2017 4:34 PM
Last Login Date:	October 9, 2017 7:49 PM
Last Activity Date:	October 10, 2017 10:17 PM
Last Password Change:	October 9, 2017 7:49 PM
Last Lock-Out Date:	Never
User Is Online:	False
Locked Out:	False
Authorized:	True
Update Password:	False
Deleted:	False
User Folder:	007/07/7/

Cancel











Save

7.1.10 Reset User's Password

To reset the user's password select the change password function.



The screenshot displays the 'Users' management page. On the left is a dark sidebar with icons for clock, list, wrench, line graph, gear, and a user profile. The top left corner features the Florida Department of Agriculture and Consumer Services logo and the name 'Adam H. Putnam, Commissioner'. The main header is 'Users' with an 'Add User' button. Below the header, there's a 'Show: Authorized' dropdown and a 'Search Users' input field. The user list table has columns for NAME, EMAIL, and JOINED. A context menu is open for the user 'jack will', showing options like 'View Profile', 'View Assets', 'Change Password' (highlighted), 'Force Password Change', 'Send Password Reset Link', 'Un-Authorize User', 'Delete User', 'Make Super User', and 'Login As User'.

	NAME	EMAIL	JOINED	
	AdminUser Account adminuser	satish@epicgroupllc.com	09/27/2017	    ...
	marshall mmathers	antonio@epicgroupllc.com	09/26/2017	
	jermaine jcole	antonio@epicgroupllc.com	09/26/2017	
	kendrick klamar	antonio@epicgroupllc.com	09/26/2017	
	Antonio R. Watson epicgroupllc\antonio		09/26/2017	
	jack will jackwill	jackwill@test.com	09/26/2017	

Enter in the new password and then retype the password again in the password confirmation field and click the “Apply”. The system will update the user’s password.

The screenshot displays the 'Users' management page. At the top, there is a header with the 'Users' title and an 'Add User' button. Below the header, the user profile for 'Gary Miller' is shown, including his email 'gary@epicgroupplc....' and last login date '08/31/2017'. A 'CHANGE PASSWORD' modal is open, featuring two input fields: 'New Password:' and 'Confirm Password:'. Both fields are highlighted with red rectangles. Below these fields are 'Cancel' and 'Apply' buttons, with the 'Apply' button also highlighted with a red rectangle. To the right of the modal, the 'ACCOUNT DATA' section lists various user attributes: Created Date (August 31, 2017 4:34 PM), Last Login Date (October 9, 2017 7:49 PM), Last Activity Date (October 10, 2017 10:17 PM), Last Password Change (October 9, 2017 7:49 PM), Last Lock-Out Date (Never), User Is Online (False), Locked Out (False), Authorized (True), Update Password (False), Deleted (False), and User Folder (007/07/7/). At the bottom of the modal, there are three links: '[Change Password]', '[Force Password Change]', and '[Send Password Reset Link]', with the first link highlighted by a red rectangle. At the bottom of the page, there are 'Cancel' and 'Save' buttons.

Users Add User

Gary Miller
epicgroupplc\garym
gary@epicgroupplc.... 08/31/2017

CHANGE PASSWORD

New Password:

Confirm Password:

Cancel Apply

ACCOUNT DATA

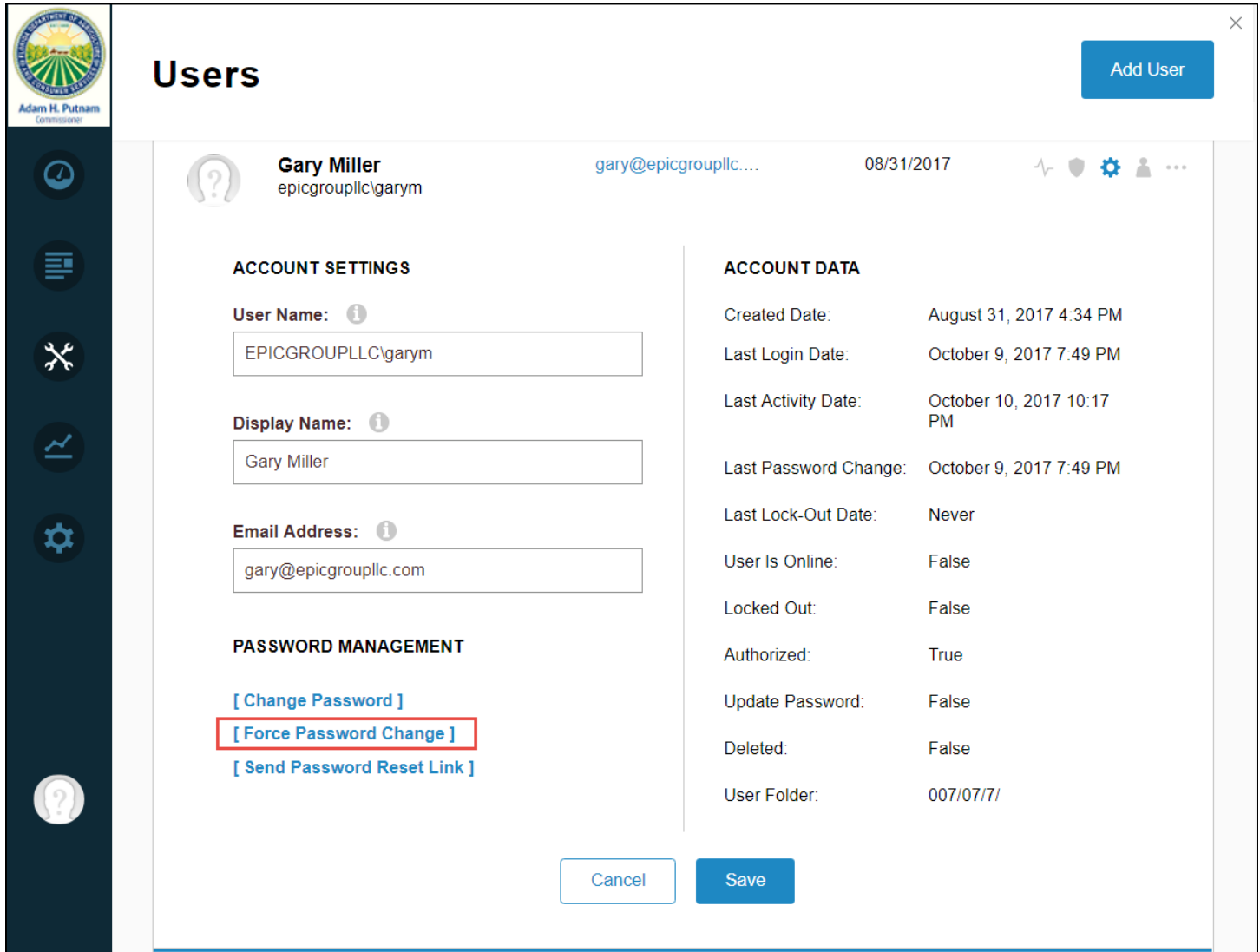
Created Date:	August 31, 2017 4:34 PM
Last Login Date:	October 9, 2017 7:49 PM
Last Activity Date:	October 10, 2017 10:17 PM
Last Password Change:	October 9, 2017 7:49 PM
Last Lock-Out Date:	Never
User Is Online:	False
Locked Out:	False
Authorized:	True
Update Password:	False
Deleted:	False
User Folder:	007/07/7/

[\[Change Password \]](#)
[\[Force Password Change \]](#)
[\[Send Password Reset Link \]](#)

Cancel Save

7.1.11 Force Password Change

To force a user to reset their password at next login, click the “Force Password Change” under Password Management. The system will send an email notification to the user of the need to change their password and provide the user with a reset link for the user to follow to reset their password.

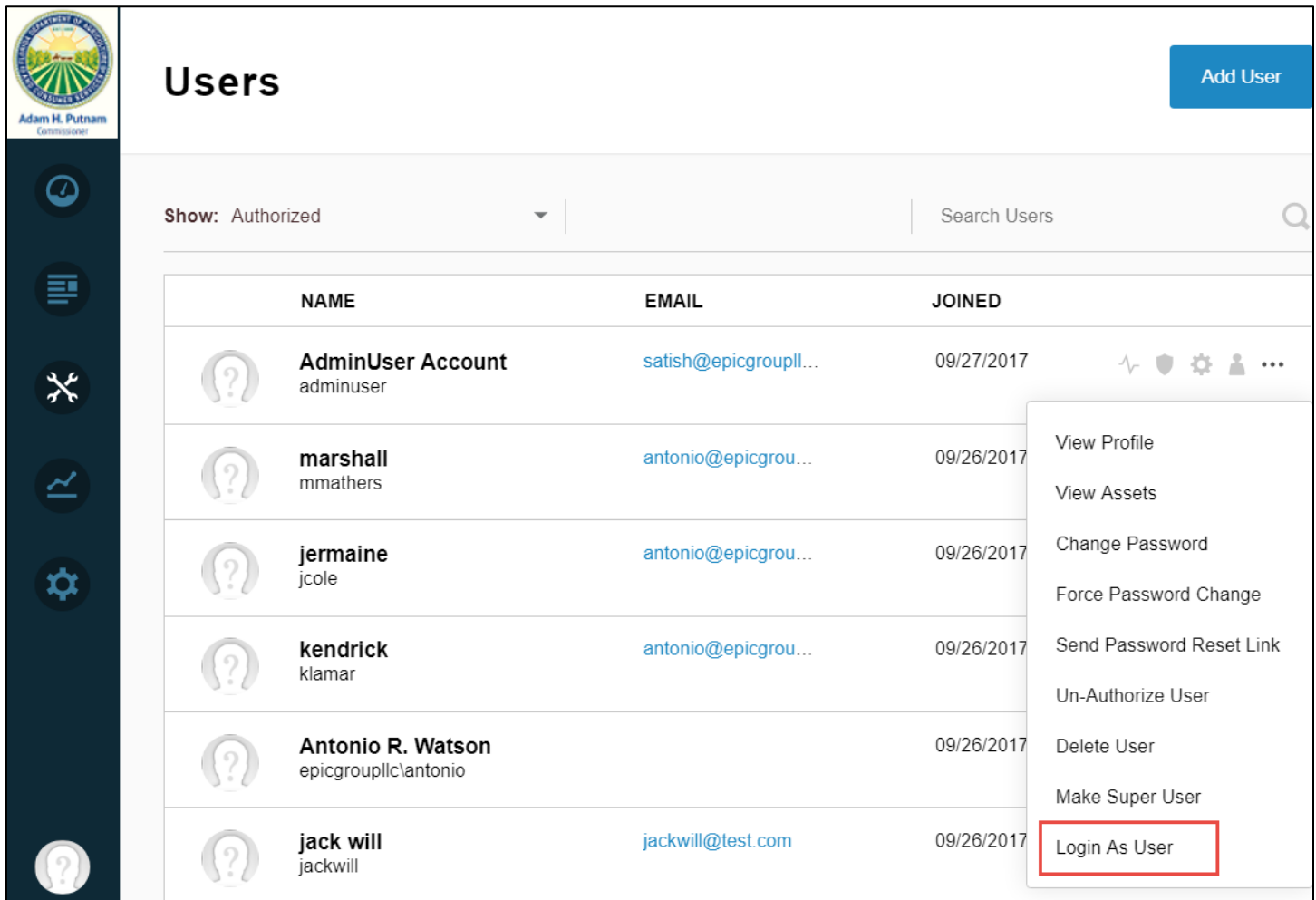


The screenshot displays the 'Users' management page. On the left is a dark sidebar with icons for dashboard, users, settings, and help. The main content area is titled 'Users' and includes an 'Add User' button. The user profile for 'Gary Miller' (epicgrouppllc\garym) is shown, with email 'gary@epicgrouppllc.com' and last login on 08/31/2017. The 'ACCOUNT SETTINGS' section contains input fields for 'User Name' (EPICGROUPLLC\garym), 'Display Name' (Gary Miller), and 'Email Address' (gary@epicgrouppllc.com). The 'PASSWORD MANAGEMENT' section features three links: '[Change Password]', '[Force Password Change]' (highlighted with a red box), and '[Send Password Reset Link]'. The 'ACCOUNT DATA' section on the right lists various system metrics like 'Created Date', 'Last Login Date', and 'User Is Online'. At the bottom are 'Cancel' and 'Save' buttons.

ACCOUNT DATA	
Created Date:	August 31, 2017 4:34 PM
Last Login Date:	October 9, 2017 7:49 PM
Last Activity Date:	October 10, 2017 10:17 PM
Last Password Change:	October 9, 2017 7:49 PM
Last Lock-Out Date:	Never
User Is Online:	False
Locked Out:	False
Authorized:	True
Update Password:	False
Deleted:	False
User Folder:	007/07/7/







7.1.12 Login as User

To login as another user, click the “...” menu icon for that user and click Login as User. The system will log in the Super User as the user selected.



Users Add User


Show: Authorized | Search Users

NAME	EMAIL	JOINED
 AdminUser Account adminuser	satish@epicgrouppl...	09/27/2017
 marshall mmathers	antonio@epicgrou...	09/26/2017
 jermaine jcole	antonio@epicgrou...	09/26/2017
 kendrick klamar	antonio@epicgrou...	09/26/2017
 Antonio R. Watson epicgrouppllc\antonio		09/26/2017
 jack will jackwill	jackwill@test.com	09/26/2017

- View Profile
- View Assets
- Change Password
- Force Password Change
- Send Password Reset Link
- Un-Authorize User
- Delete User
- Make Super User
- Login As User**

7.1.13 Make Super User








To make an account into a Super User account, click the “...” menu icon for that user and click “Make Super User”. The system will update the user account to Super User.



UsersAdd User

Show: Authorized

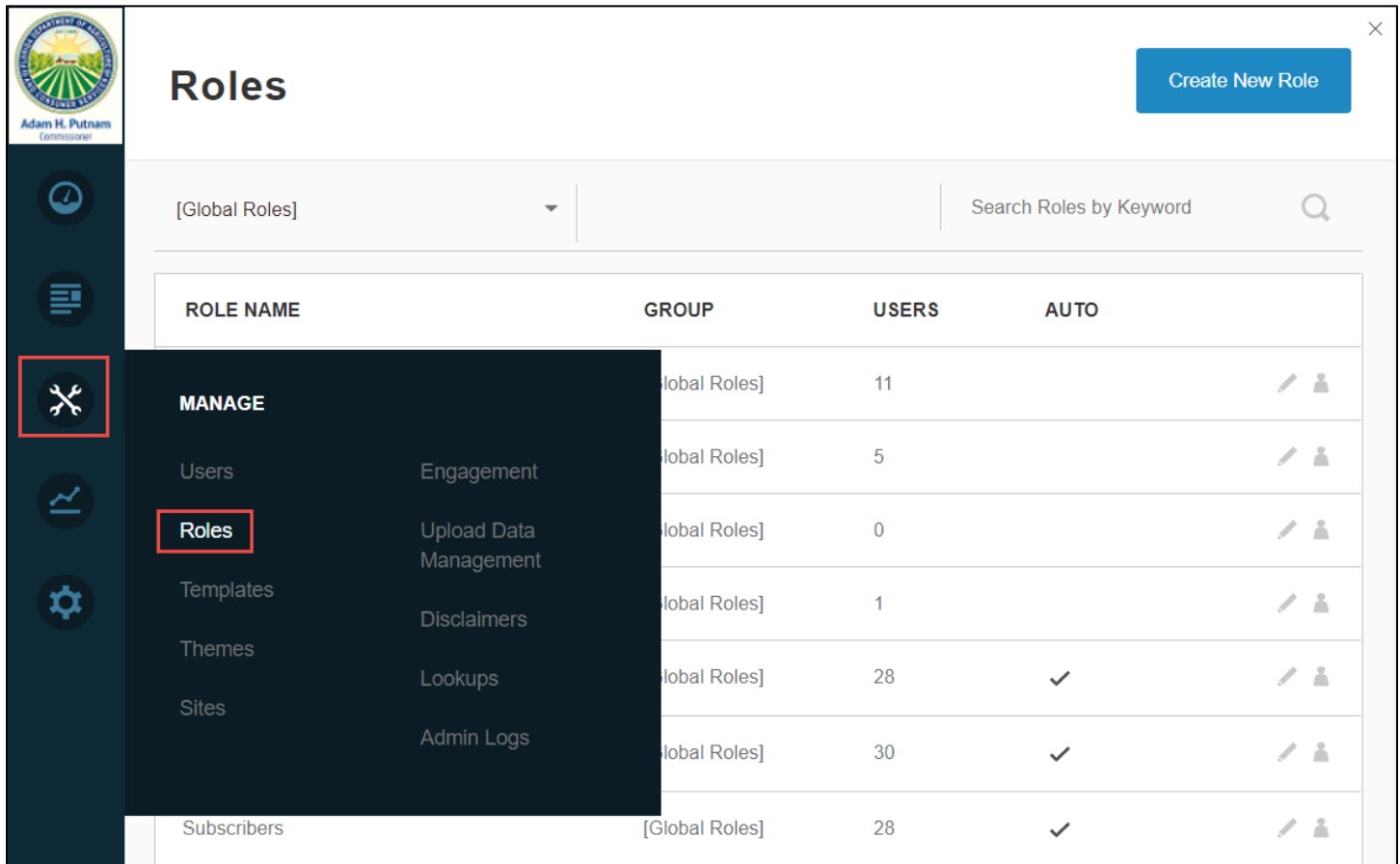
Search Users

	NAME	EMAIL	JOINED	
	AdminUser Account adminuser	satish@epicgrouppl...	09/27/2017	
	marshall mmathers	antonio@epicgrou...	09/26/2017	<div><div>View Profile</div><div>View Assets</div><div>Change Password</div><div>Force Password Change</div><div>Send Password Reset Link</div><div>Un-Authorize User</div><div>Delete User</div><div>Make Super User</div><div>Login As User</div></div>
	jermaine jcole	antonio@epicgrou...	09/26/2017	
	kendrick klamar	antonio@epicgrou...	09/26/2017	
	Antonio R. Watson epicgrouppllc\antonio		09/26/2017	
	jack will jackwill	jackwill@test.com	09/26/2017	

7.2 Manage Roles

7.2.1 View Roles

To view the Roles List, login with an administrator account. Next, click the “Manage” icon on the admin menu on the left side of the screen and click “Roles”



Roles Create New Role

[Global Roles] Search Roles by Keyword

ROLE NAME	GROUP	USERS	AUTO
[Global Roles]		11	
[Global Roles]		5	
[Global Roles]		0	
[Global Roles]		1	
[Global Roles]		28	✓
[Global Roles]		30	✓
Subscribers	[Global Roles]	28	✓

7.2.2 Search Roles

To search the Roles List, start typing into the search box and the system will return matching results.

The screenshot shows the 'Roles' management page. On the left is a dark sidebar with icons for dashboard, roles, settings, and a wrench. The main header includes the Florida Department of Agriculture and Consumer Services logo, the name 'Adam H. Putnam, Commissioner', and a 'Create New Role' button. Below the header, there is a dropdown menu set to '[Global Roles]' and a search box containing the text 'public'. The search results table has four columns: 'ROLE NAME', 'GROUP', 'USERS', and 'AUTO'. One result is shown: 'Public Users' in the 'ROLE NAME' column, '[Global Roles]' in the 'GROUP' column, '28' in the 'USERS' column, and a checkmark in the 'AUTO' column. The 'Public Users' role name is highlighted with a red box.

ROLE NAME	GROUP	USERS	AUTO
Public Users	[Global Roles]	28	✓


7.2.3 Add Roles

To add a role, click the “Create New Role” button.

This screenshot shows the same 'Roles' management page. The 'Create New Role' button in the top right corner is highlighted with a red box. The search box is now empty and contains the placeholder text 'Search Roles by Keyword'. The table below lists five roles: 'Administrators', 'Champion Users', 'Content Editors', 'Content Managers', and 'Public Users'. All roles are in the '[Global Roles]' group. The user counts are 11, 5, 0, 1, and 28 respectively. The 'Public Users' role has a checkmark in the 'AUTO' column. Each row has edit and delete icons at the end.

ROLE NAME	GROUP	USERS	AUTO
Administrators	[Global Roles]	11	
Champion Users	[Global Roles]	5	
Content Editors	[Global Roles]	0	
Content Managers	[Global Roles]	1	
Public Users	[Global Roles]	28	✓

Next, enter a name for the Role, a description for the Role, select Public or not (Check this box if users can subscribe to this role via the Manage Services page of their user account), choose the Role group that to add the new Role to, choose the security mode for the role, choose the status for the role and choose if this role will automatically be assigned to all users and click the “Save” button. The system will save the Role to the Role List.



RolesCreate New Role

[Global Roles]

public

ROLE NAME	GROUP	USERS	AUTO
-	-	0	

Role Name ⓘ

Description ⓘ

Public ⓘ

Role Group ⓘ

[Global Roles]

Security Mode ⓘ

Security Role

Status ⓘ

Approved


Auto Assignment ⓘ

Cancel

Save

7.2.4 Edit Roles

To edit a Role, click the “Edit” icon for the Role that is to be edited.



Adam H. Putnam
Commissioner


Roles

Create New Role

[Global Roles] Search Roles by Keyword

ROLE NAME	GROUP	USERS	AUTO
Administrators	[Global Roles]	11	
Champion Users	[Global Roles]	5	
Content Editors	[Global Roles]	0	
Content Managers	[Global Roles]	1	
Public Users	[Global Roles]	28	✓

Next, make necessary updates and click the “Save” button.



Adam H. Putnam
Commissioner

Roles



Create New Role


Public Users

[Global Roles]


28

✓




Role Name 


Public Users

Description 


General Public

Public 


☒

Role Group 


[Global Roles]

Security Mode 


Security Role

Status 

Approved

Auto Assignment 

☒

Assign to Existing Users 

☐

Delete

Cancel

Save

7.2.5 Delete Roles

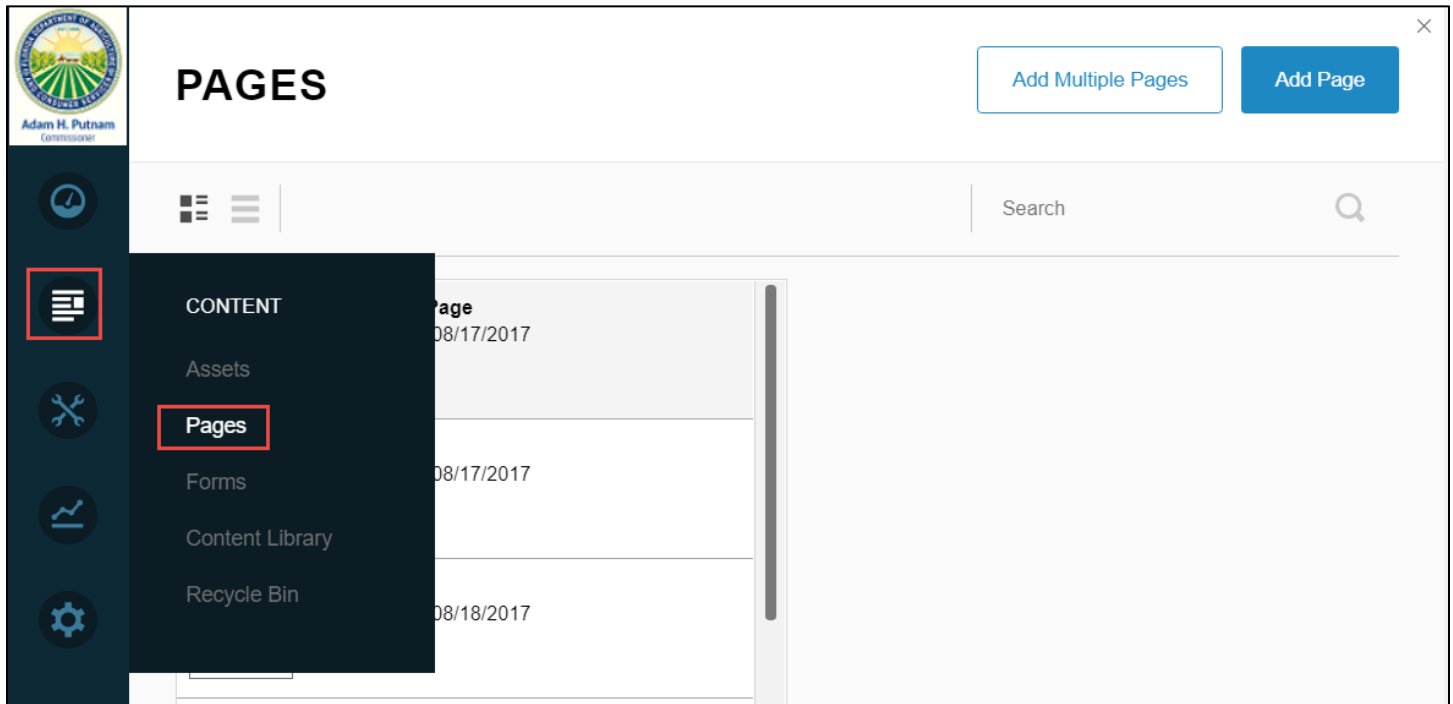
To Delete a Role, click the “Edit” icon for the role that is to be deleted. Next, click the “Delete” button. The system will display a pop up asking for confirmation of the deletion. Click the “Ok” button.

The screenshot shows the 'Roles' management interface. On the left is a dark sidebar with icons for dashboard, roles, users, settings, and help. The main content area is titled 'Roles' and includes a 'Create New Role' button. Below the title, there's a header for the selected role: 'Public Users' [Global Roles] 28. The role configuration form includes fields for 'Role Name' (Public Users), 'Role Group' ([Global Roles]), 'Description' (General Public), 'Security Mode' (Security Role), 'Status' (Approved), 'Public' (toggle), 'Auto Assignment' (toggle), and 'Assign to Existing Users' (toggle). At the bottom, there are three buttons: 'Delete' (highlighted with a red box), 'Cancel', and 'Save'.

7.3 Manage Permissions

7.3.1 View Permissions

To view Permissions, sign in with an admin account. Next, click on the “Content” icon on the Admin menu located on the left side of the screen and then click “Pages”



The system will display the Pages List. To view the permissions for a page, click the settings button.


PAGES

Add Multiple Pages Add Page

Search

	404 Error Page Published: 08/17/2017 Page is hidden in menu	
	HOME Published: 08/17/2017	
	ABOUT Published: 08/18/2017	
	DATA Published: 08/18/2017	
	MAP Published: 08/18/2017 6	
	CONTACT Published: 08/18/2017	

Next select the Permissions tab to view the permission for the page.




Adam H. Putnam
Commissioner

404 ERROR PAGE

[Duplicate Page](#)[Save Page Template ▾](#)

[< BACK TO PAGES](#)

DetailsPermissionsAdvanced



404 Error Page

Created: 8/17/2017 by System **Page Parent:** Top Page **Status:** Hidden

Page Type: ☒ Standard ☐ Existing ☐ URL ☐ File


Name* ⓘ

Title ⓘ







Description

Keywords

The system will display the Permissions for the page.



Adam H. Putnam
Governor



404 ERROR PAGE

Duplicate Page

Save Page Template ▾

BACK TO PAGES

DetailsPermissionsAdvanced

PERMISSIONS BY ROLE

Filter By Group: GlobalGroupsText ▾

Begin typing to add a role + Add

ROLE	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
All Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

PERMISSIONS BY USER

Begin typing to add a user + Add

USER	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
ADD A USER TO SET PERMISSIONS BY USER											

Cancel


Save







Property of the Florida Department of Agriculture and Consumer Services

112

7.3.2 Permissions by Role

Permissions can be set by Role. To set Permissions by role for a page, check the box for each function or control to be allowed for that role and click the “Save” button.





404 ERROR PAGE

[Duplicate Page](#)[Save Page Template ▾](#)

[< BACK TO PAGES](#)

DetailsPermissionsAdvanced

PERMISSIONS BY ROLE

Filter By Group: GlobalGroupsText ▾

Begin typing to add a role+ Add

ROLE	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
All Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

PERMISSIONS BY USER


Begin typing to add a user+ Add

USER	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
ADD A USER TO SET PERMISSIONS BY USER											

[Cancel](#)[Save](#)

7.3.2.1 Search and Add Role

To search for a Role to add, begin typing the name of the roll to be added in the search box. The system will return matching results. Click the appropriate result. Next, click the “Add” button. The role will be added to the list of Roles and is ready to have permissions set.



404 ERROR PAGE

Duplicate PageSave Page Template

BACK TO PAGES

DetailsPermissionsAdvanced

PERMISSIONS BY ROLE

Filter By Group: GlobalGroupsText

pub

Public Users

+ Add

ROLE	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
All Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

PERMISSIONS BY USER


Begin typing to add a user+ Add

USER	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
ADD A USER TO SET PERMISSIONS BY USER											

CancelSave

7.3.3 Permissions by User

Permissions can be set by user. To set Permissions by user for a page, check the box for each function or control to be allowed for that user and click the “Save” button.



404 ERROR PAGE

Duplicate PageSave Page Template

BACK TO PAGES

DetailsPermissionsAdvanced

PERMISSIONS BY ROLE

Filter By Group: GlobalGroupsTextpubAdd

Public Users

ROLE	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
All Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

PERMISSIONS BY USER


Begin typing to add a userAdd

USER	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
ADD A USER TO SET PERMISSIONS BY USER											

CancelSave

7.3.3.1 Search & Add User

To search for a User to add, begin typing the name of the User to be added in the search box. The system will return matching results. Click the appropriate result. Next, click the “Add” button. The role will be added to the list of Users and is ready to have permissions set.



404 ERROR PAGE

Duplicate PageSave Page Template

BACK TO PAGES

DetailsPermissionsAdvanced

PERMISSIONS BY ROLE

Filter By Group: GlobalGroupsTextpubAdd

Public Users

ROLE	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Editors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Content Managers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
All Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Registered Users	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

PERMISSIONS BY USER

Begin typing to add a userAdd

USER	VIEW	ADD	ADD CONTE...	COPY	DELETE	EXPORT	IMPORT	MANAGE SETTIN...	NAVIGA...	EDIT	
ADD A USER TO SET PERMISSIONS BY USER											

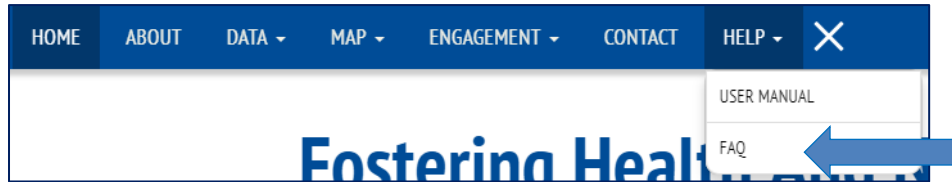
CancelSave

8 Help

8.1 FAQ, Contact & User Manual

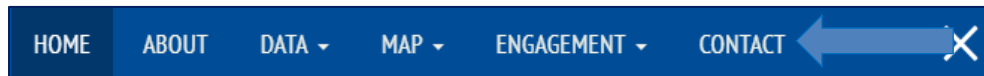
8.1.1 FAQ

FAQ provides users with questions and answers of commonly asked questions in reference to Florida’s Roadmap to Living Healthy application. To navigate to the FAQ, click “FAQ” under “Help” in the top menu for the application.



8.1.2 Contact Information

Contact information is to report issues, concerns or submit questions in regards to the Roadmap to Living Healthy application. The contact information is provided in the “Contact” section of the Homepage. To navigate to the “Contact” section of the Homepage, click “Contact” on the main menu located at the top of the Homepage or manually scroll down the Homepage until you reach the “Contact” section.



8.1.3 User Manual

The user manual contains step by step instructions to navigate users through the usage of the Roadmap to Living Healthy application. To read the user manual, click “User Manual” under “Help” on the main menu located at the top of the Homepage.



